

Money Matters

Date : Every 1st Thu of the month
 Time : 7 pm – 9.30 pm
 Venue : Sophia Centre
 Facilitator : Dannis Teo
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A FINANCIAL Learning Community

Start Date: 1 May 2014

Money matters, take a practical look at financial matters in our daily life whether as working adults as well as retirees. The purpose is to promote financial literacy and learning amongst members through talks, forums and individual sharing. We take a holistic approach to address various financial issues and coverage will include investing, insurance, estate planning, etc. In the process we learn practical solutions to real-life problems and acquire wisdom not just in money matters but also in handling people and family issues.

Learning Sessions

<p>1. Your Savings Is it enough for retirement? If not what are the available options? How can we stretch our savings to last over a longer period?</p> <p style="text-align: right;">1 May 2014</p>	<p>2. Buying Insurance The critical role of insurance before and during retirement. What and who should we insure with, and why?</p> <p style="text-align: right;">5 Jun 2014</p>	<p>3. Making Investments What are some fundamental investment concepts we must know? Which investment vehicles can we use? How does risks commensurate with returns</p> <p style="text-align: right;">3 Jul 2014</p>
<p>4. Financial Health Evaluation What is financial health? What are the signs and symptoms of ill financial health? Evaluation and planning for better financial health</p> <p style="text-align: right;">7 Aug 2014</p>	<p>5. Wills, Trusts & Estate planning Is there a need for these? DIY possible? What are the critical elements to consider and process of execution?</p> <p style="text-align: right;">4 Sep 2014</p>	<p>6. AMD & LPA What are the pros and cons of an Advance Medical Directive & Lasting Power Of Attorney? What are the key considerations? How are these implemented?</p> <p style="text-align: right;">2 Oct 2014</p>

Learning Facilitator – Dannis Teo

He is the Director of Boon Lien Electrical and Engineering Pte Ltd and 2nd Vice President of the Singapore Association for Continuing Education. He himself is a successful property and financial investor.

Understand practical money management methods. Learn to spend wisely!