



Dollars & Sense

A set of 3 practical, 90-minute web-based workshops, designed to help individuals understand, manage and navigate their personal financial wellbeing.

Can be delivered online, or in a face-to-face workshop

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Program Content

Lesson 1 | Money Habits – your financial trajectory

Lesson 2 | The “Household P&L”

Lesson 3 | Household Budgets & Forecasting

Lesson 4 | Strategies for Saving & Investing,

Lesson 5 | Understanding Debt, and simulating debt situations

Lesson 6 | Good debt versus Bad debt

Lesson 7 | Compound interest, and the stunning bonus of time

Lesson 8 | How interest works – and how banks work

Lesson 9 | Understanding Credit Scores

Lesson 10 | Managing a Credit Card

Lesson 11 | Managing Financial Risk

Lesson 12 | Personal Balance Sheets and building an asset base

Lesson 13 | Teaching your children Financial Literacy - games and habits that work

Lesson 14 | Managing Cashflow

Lesson 15 | Understanding the “Inflation Thief” & the Language of Economics

Lesson 16 | Setting up a small business

Lesson 17 | Avoiding Financial Scams – The “Deception Detective” scam spotter

Lesson 18 | What is - Fiat v Crypto

Lesson 19 | Q & A, Close

Resources include Acronyms, Equations & Apps, language logs, toolkits, links

**We are not financial advisors, and we do not sell or endorse any financial products, companies or institutions.
We simply want to help you explore and learn about money.*

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If you want a glimpse of your financial future, just look at your current financial habits. Money habits are compound interest to your financial wellbeing.



Face to face Training
Is an option



Webinar Delivery
standard



Theory Workbook
Provided



Tailored to Delegates'
Experience Level

There is no secret to being “Financially Savvy” but many of us struggle with the language of commerce, the application of theoretical school maths to real life, and the lack of available, practical examples that help many of us with personal financial management, on a day-to-day basis.

This web series is an interactive experience, rich in simulations and practical exercises, designed to cultivate practical financial smarts.

We will help you learn essential personal finance skills, including budgeting, debt management, household cash management, navigating inflation, building equity and assets, credit score optimization and a whole host of other practical scenarios. You will explore the differences between good and bad debt and learn to navigate and plan for a financially savvy future, as far as is practically possible. Linking personal and business finances, you can also grasp how your financial choices translate into a business, linking personal and organisational commerce.

As an employer, you could empower your people with the confidence to make informed financial decisions, fostering a financially resilient and money-savvy team. Investing in people's financial well-being is positioning your organization as a responsible employer committed to employee prosperity.

It's the stuff many of us wished we had learnt when we were younger...

This course suits people who are wish to learn more about the basics of good money habits or who are without a strong financial background, but keen to learn more.