

#ON-BOARDING

New employees



ISITHEBE FINANCIAL WELLNESS

Over 70% of people who leave one employer for another, opt for a cash payment, this is not ideal as it will leave you having to start your retirement savings from scratch exposing you to the risk of not having enough money come retirement time. (Source: Sanlam).

Understanding my salary and benefits structure

- How does my provident fund work
- How to use your employee benefits in estate planning

Stakeholder management

- How to manage black tax
- Determine your money personality

How to eliminate duplication of risk benefits

- Understanding your group life
- What will your dependants get when you pass away

Life-staging

- Drafting a life stage plan, what needs to be in place at different stages of our lives
- How do choose the correct asset class/ investment using your age

Debt management

- Understanding how interest rates are determined
- Debt consolidation vs. debt counselling

Saving and Investing

- Products that are available and how they work
- How to identify investment schemes

WORKSHOPS

- Face to face or online
- The length of the session will be as per client's requirements
- Will be facilitated to groups, with the maximum number per session being 15

WELLNESS DAYS

- Can be held as a standalone or alongside other wellness day initiatives
- We will print Credit reports for participants along with other financial awareness tools
- These will be onsite

ONE ON ONE CONSULTATION

- This will be a closed session with the individual
- Each session will be for 1 hour

PUBLICATIONS

- Dependent on the client these will either be electronic or hard copies