

Do you want to enable the people in your organisation to stay in great financial shape?

Now you can.



FINANCIAL WORKSHOPS FROM OFF-PISTE WEALTH | AN INVITATION TO CEOs AND HR DIRECTORS



## Great for you and the organisation

As a CEO or HR Director, you know the importance of supporting the wellbeing of each and every staff member while they're with you. Now you have a chance to go a step further, and show you also care about their longer-term financial wellbeing.

## Great for 'them' – your employees

Those in your organisation you're looking to support may be:

- Wishing they were better able to address a particular financial challenge
- Not in the habit of saving any of their income
- Thinking that 'wealth management' is only for other people

Whichever is true for them, they're likely to benefit from workshops designed to put them in greater control of their finances, and thus of their lives.

## About the Workshops

We offer two kinds of workshops: one is a six-week ready-to-go programme; the other is a series of bespoke workshops. We can also offer a Drop-in Financial Surgery. *(Please read on for more details.)*

## About Us

Off-Piste Wealth exists to educate and empower professionals and their families through educational workshops and bespoke financial advice.



**"My aim is to enable people to map out a plan for their future, to create a better relationship with money... and ultimately to live a more abundant life."**

David Gregory, Founder, Off-Piste Wealth



## Financial Workshop

### OPTION 1

### The six-week ready-to-go programme

1. Introduction to having a healthy money mindset
2. How to save money on tax
3. The importance of financial protection
4. Where & how to start investing
5. How to make your money work harder for you
6. Introduction to your different investment options

### ALSO AVAILABLE

### Drop-in Financial Surgery

Apart from the workshops, another option we can provide is a regular drop-in financial surgery, where we answer questions and offer support on a 121 basis.

## Financial Workshop

### OPTION 2

### A series of bespoke workshops

These can be tailored to match the needs of the particular individuals attending. The number of workshops is also bespoke.

In addition to those mentioned in Option 1, topics could include:

- Money Mindset sessions (Values / Challenges / Beliefs / Language)
- Estate planning
- Investing for children
- Learning about Cryptocurrency
- Behavioural Finance
- Ethical investing
- Growth versus Income

### WHAT NEXT?

### Learning more in a Discovery Call

To learn more about each, I invite you to get in touch for a discovery call. See below for contact details.

# How will the choices they make today affect their tomorrows?

**“While many young people know how to stay in good shape physically, sadly all too many do not take the same care of their financial wellbeing.**

**All too often, I hear from people who wished they’d had basic ‘financial literacy’ much earlier in life... and had taken steps that could have made such a difference to their standard of living and way of life.**

**I’m passionate about enabling young people to change their ‘money mindset’, to see how to grow their wealth, and so take much better care of their future selves.”**

David Gregory, founder, Off-Piste Wealth



## Get in touch today

For more details about our Financial Workshops, and how best to support those in your organisation, please contact me directly.

**M:** 07944 205 553

**T:** 020 3380 4230

**E:** david@offpistewealth.com

**W:** offpistewealth.com

