

SEHG IN-PERSON WORKSHOP SERIES

Managing Personal Finances

Instructor-Led Workshop · Facilitator Kit

Complete facilitator kit for delivering the SEHG Managing Personal Finances workshop on site — training manual, instructor guide, slides, icebreakers, quick-reference sheets, and completion certificates.

WHAT'S IN THIS KIT

01 · Training Manual (participant workbook)

02 · Instructor Guide (facilitator script & timings)

03 · Icebreakers & Activities

04 · Presentation Slides

05 · Quick Reference Sheets (takeaway)

06 · Certificate of Completion

SEHG-PD-4083 · IN-PERSON WORKSHOP KIT

synergyeducationholdings.com

Managing Personal Finances

SYNERGY EDUCATION HOLDINGS GROUP · IN-PERSON WORKSHOP SERIES

About This Workshop

For many people, finances are an unsolvable Rubik's cube filled with anxiety. There are millions of Americans who live with the shackles of debt each day. We don't teach children when they are young, the value of a good credit score. Many people have a hard time formatting and sticking to a budget. You can easily solve the finance puzzle with a little hard work, self-control, and the right tools. Today is a new day; you are taking the first steps to reclaiming your financial freedom.

Personal Development course: Managing Personal Finances.

Workshop Objectives

- Understand your personal expenses
- Know the benefits of making a budget
- Set financial goals
- Develop good spending habits
- Learn how to pay off debt
- Learn how to effectively make a budget

Format & Delivery

- Instructor-led session, delivered on site or SEHG-hosted
- Includes participant workbooks, activities, and takeaway reference sheets
- Every participant receives an SEHG Certificate of Completion
- Pairs with the SEHG online Managing Personal Finances course for pre-work and reinforcement

Preparing & Delivering the Workshop

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Before the Workshop

- Review the Instructor Guide end to end — timings, scripts, and activity setup
- Print one Training Manual and one Quick Reference Sheet per participant
- Load the Presentation Slides and test the projector, audio, and clicker
- Choose 1–2 icebreakers from the kit that fit the group size and room
- Prepare blank Certificates of Completion for sign-off at close

Checking Out the Venue

- Adequate seating with clear sight lines to the facilitator and screen
- Projector compatibility, cables, and extension cords tested in advance
- Lighting that lets participants see you, their notes, and the screen
- Space for group activities, plus a table for handouts and materials

Closing the Session

- Recap the workshop objectives and each participant's key takeaway
- Distribute the Quick Reference Sheet as the on-the-job takeaway
- Present the SEHG Certificate of Completion to each participant
- Point participants at the paired SEHG online course for reinforcement

Book this workshop

Contact your SEHG program advisor to schedule this workshop for your team, or add it to any SEHG learning program as the in-person option.

SYNERGY EDUCATION HOLDINGS GROUP

Certificate of Completion

This certificate is proudly presented to

for successfully completing the SEHG in-person workshop

Managing Personal Finances

Awarded this ____ day of _____, 20__

Facilitator Name & Title



Synergy Education Holdings Group