



## COURSE OUTLINE

### 1 PERSONAL FINANCE BASICS

- DEBT MANAGEMENT
- SAVINGS
- BUDGETING
- TRACKING EXPENSES

### 2 PORTFOLIO CREATION & MANAGEMENT

- HYBRID PORTFOLIO
- GROWTH PORTFOLIO
- INCOME PORTFOLIO

### 3 INVESTING FUNDAMENTALS

- DIVERSIFICATION
- LIQUIDITY
- CASH FLOW MANAGEMENT
- IDENTIFYING SCAMS
- INVESTMENT COSTS

### 4 ALTERNATIVE INVESTMENTS

- SACCOS
- CRYPTO (BITCOIN)
- FIXED INCOME FUNDS, EQUITY FUNDS, MANSA X + OTHER TYPES OF FUNDS

### 5 SAVING AVENUES

- KES MONEY MARKET FUNDS
- USD MMFS
- SAVING AND FIXED DEPOSIT ACCOUNTS

### 6 WEALTH PROTECTION BASKET

- LIFE INSURANCE
- EDUCATION POLICIES
- HEALTH INSURANCE
- ENDOWMENT PLANS

### 7 FIXED INCOME

- T-BILLS
- T-BONDS
- EURO BONDS

### 8 RETIREMENT PLANNING

- PENSIONS
- INCOME DRAWDOWN FUNDS
- ANNUITIES

### 9 THE STOCK MARKET

- NAIROBI SECURITIES EXCHANGE
- OFFSHORE STOCKS
- EXCHANGE TRADED FUNDS (ETFs)
- HOW TO PICK STOCKS /ETFs
- HOW TO READ AND ANALYZE FINANCIAL STATEMENTS

to register send money to  
**M-PESA TILL-8536314**

**Regular-7,500ksh**  
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