Training Course on Financial Wellness Programs for Retirement Readiness

Professional Development Training Course Outline

Category	Pension and Retirement	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Training Course on Financial Wellness Programs for Retirement Readiness is designed to equip financial professionals with the tools and knowledge necessary to develop and implement effective financial wellness programs that prepare individuals for a secure retirement. As the landscape of retirement planning continues to evolve, it is essential to address not only the financial aspects but also the psychological and educational needs of members. Financial wellness encompasses a holistic approach to financial health, focusing on budgeting, saving, investing, and planning for retirement. By promoting financial literacy and empowering individuals with the skills to manage their finances, organizations can enhance retirement readiness and improve overall well-being. This course will explore best practices for creating financial wellness programs that cater to diverse populations and encourage proactive engagement in retirement planning. Participants will learn about various components of financial wellness programs, including workshops, online resources, one-on-one coaching, and digital tools. The course will also address the importance of tailoring programs to meet the unique needs of different demographic groups, ensuring accessibility and relevance. Through a combination of theoretical insights and practical applications, participants will engage in case studies, interactive discussions, and hands-on exercises. By the end of the course, attendees will have a comprehensive understanding of how to design and implement effective financial wellness strategies that promote retirement readiness and empower individuals to take control of their financial futures.

Programme Curriculum

Training Course on Financial Wellness Programs for Retirement Readiness

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Course Objectives

1. Understand the concept of financial wellness and its importance for retirement readiness.
2. Analyze the components of effective financial wellness programs.
3. Evaluate strategies for promoting financial literacy among members.
4. Explore the role of technology in delivering financial wellness resources.
5. Discuss best practices for tailoring programs to diverse populations.
6. Develop skills in creating engaging and informative financial workshops.
7. Assess the effectiveness of financial wellness initiatives through evaluation.
8. Identify tools for measuring the impact of financial wellness programs.
9. Create actionable strategies for implementing financial wellness initiatives.
10. Stay informed about emerging trends in financial wellness.
11. Foster a culture of financial responsibility within organizations.
12. Enhance client relationships through effective financial education.
13. Promote long-term financial health and retirement readiness.

Target Audience

1. Financial advisors and planners
2. HR professionals managing employee benefits
3. Compliance officers in financial services
4. Educators in finance and financial literacy
5. Program coordinators in nonprofit organizations
6. Data analysts focusing on financial wellness
7. Policy makers in financial regulation
8. Marketing professionals in financial services

Course Duration: 5 Days

Course Modules

Module 1: Introduction to Financial Wellness

- Define financial wellness and its components.
- Explore the relationship between financial wellness and retirement readiness.
- Discuss the importance of financial literacy for individuals.
- Identify barriers to financial wellness in different populations.
- Review case studies of successful financial wellness programs.

Module 2: Components of Effective Financial Wellness Programs

- Analyze the core elements of financial wellness initiatives.
- Discuss the role of education, resources, and support in programming.
- Explore various delivery methods for financial wellness content.
- Identify best practices for engaging participants in programs.
- Review real-world examples of effective program components.

Module 3: Promoting Financial Literacy

- Discuss strategies for enhancing financial literacy among members.
- Explore educational resources and tools for teaching financial concepts.
- Identify techniques for making complex information accessible.
- Review best practices for delivering financial literacy workshops.
- Analyze case studies of organizations promoting financial literacy.

Module 4: The Role of Technology in Financial Wellness

- Explore digital tools and platforms for delivering financial wellness resources.
- Discuss the impact of mobile apps and online courses on engagement.
- Identify best practices for utilizing technology in financial education.
- Review case studies of successful technology-driven programs.
- Analyze trends in fintech that support financial wellness

Module 5: Tailoring Programs to Diverse Populations

- Discuss the importance of inclusivity in financial wellness programs.
- Explore strategies for addressing the unique needs of different demographics.
- Identify resources for creating culturally relevant educational content.
- Review best practices for outreach and engagement with diverse groups.
- Analyze case studies of tailored financial wellness initiatives

Module 6: Designing Engaging Financial Workshops

- Discuss the key elements of effective workshop design.
- Explore techniques for facilitating engaging and interactive sessions.
- Identify tools for creating informative and visually appealing materials.
- Review best practices for evaluating workshop effectiveness.
- Analyze case studies of successful financial workshops.

Module 7: Evaluating Financial Wellness Initiatives

- Discuss the importance of program evaluation in financial wellness.
- Explore methods for assessing participant engagement and satisfaction.
- Identify key performance indicators (KPIs) for measuring success.
- Review tools for collecting and analyzing feedback data.

- Analyze case studies of organizations measuring program impact.

Module 8: Creating Actionable Financial Wellness Strategies

- Outline steps for developing a comprehensive financial wellness program.
- Discuss the importance of stakeholder engagement in planning.
- Identify techniques for setting measurable objectives and timelines.
- Explore resources for ongoing support and development.
- Review case studies of actionable financial wellness strategies.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.
- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to Fineskill Training Center account, as indicated in the invoice, to enable better preparation.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price

23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com