



Summer Fields School

Kailash Colony, New Delhi - 110048

Report on Financial Literacy Workshop

Do not save what is left after spending, but spend what is left after saving. – Warren Buffett

Summer Fields School, Kailash Colony School hosted a comprehensive CBSE workshop on Financial Literacy, skillfully conducted by Mr. Ram Kumar Gupta. Attended by the dedicated educators the workshop aimed at empowering teachers with essential knowledge on financial planning and literacy.

Mr. Gupta delved into various facets of financial literacy, enlightening participants on prudent ways of saving, strategic financial planning across different life stages, and the invaluable benefits of investing in life insurance and health policies. Using real-life examples, he elucidated diverse investment strategies, emphasizing the heightened importance of long-term investment strategies in the post-pandemic era.

The resource person Mr. Ram Kumar Gupta threw some light on the basics of banking and financial securities, she also emphasized on the importance of savings for better prospects, how to be extra vigilant about financial scams which is a direct threat to us.

Mr. Ram Kumar Gupta, a CFPCM, MBA (Finance), PGDWM & FP, NCFM, MCX, NISM, NCDEX Certified Complete professional with direct selling experience of over 20 years and more than 16 years in training and courseware development for Financial Planning Industry. Former Academic Head with ISBF-CFP and worked as a freelancer faculty for various modules of CFPCM, NCFM, NISM, MCX with Industry leaders like CBSE, BSE Institute Ltd., CIEL, Ambition Academy, Café Mutual, Forum India, etc. and conducting IAP for various AMC's with very good results and excellent feedback. He elaborated on the various ways of saving one's earning, planning one's finance at different stages of life as well as benefits of investing in life insurance and health policies. He also enunciated through varied examples from daily life, the concepts like overnight funds, liquid funds, ultra-short duration funds, money market funds and low duration funds. Further, he explained the principles of Personal Money Management and suggested websites to enhance the knowledge and understanding of the working of mutual fund companies. The session proved beneficial for the attendees as they clarified their doubts regarding investments.

The session was very interactive and helped the participants to clarify their doubts related to basic financial management techniques. This accomplishment is entirely due to our esteemed Principal, Ms. Shalini Agarwal, whose unwavering dedication encourages the teachers to cultivate a love for learning.



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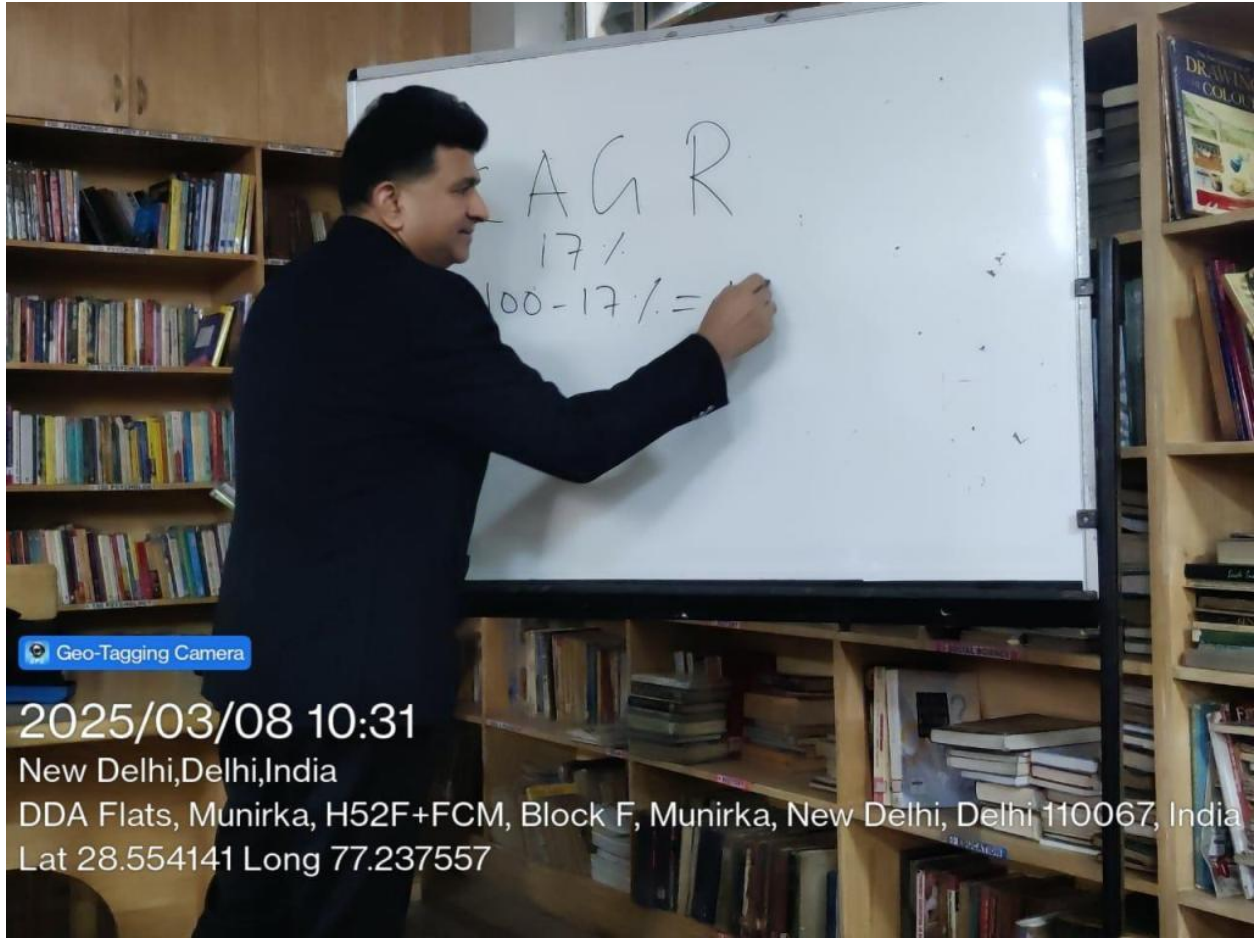
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