pennybloom

Financial Workshop Series – List of Workshops & Learning Tracks

	Session Name	List of Topics	No. of Trackers Shared	Duration (in mins)	Best Suitable for
CATEGORY 1: Smart Money Foundations & Investing Essentials (Everything an employee needs to build a strong financial base)					
1	Establishing your Relationship with Money	Basics of Saving and Investing, Assets Vs Liabilities, Effective Budgeting	3+	90	Everyone
2	Making a rock solid financial plan on YOUR OWN	Overview of Financial Avenues, Diversification Strategies & Creating a Goal Based Financial Plan	4+	90	Everyone
3	A deep-dive into Mutual Funds - Part:1	All you need to know about Mutual Funds, types to funds - Equity, Debt, Hybrid, Index, Re-balancing strategies	2+	90	Everyone
4	A deep-dive into Mutual Funds - Part:2	SIP vs Lumpsum, techincal analysis on how to pick up the right fund - Sharpe ratio, alpha, Re-balancing strategies.	3+	90	Everyone
5	Income Tax 101 — Understand Your Taxes the Simple Way	Understanding your salary structure, Tax Planning - Old vs New Regime, Taxation on Investments, ESOPS/RSUs, Common Tax Mistakes	3+	90	Everyone
6	Life Insurance - Security for your loved ones.	All you need to know about Life Insurance, Diff b/w insurance and investments, detailed analysis of insurance plans, Plans to avoid	2+	90	Everyone
7	All about Health Insurance	Health Insurance, How to choose a plan, Individual vs Family Floater, Understanding Riders, Top Up vs Super Top Up	2+	90	Everyone
8	Credit Cards – Swipe Smart, Earn Smarter	Learn how to choose the right cards, track spends, earn maximum points, and turn everyday purchases into smart savings.	3+	90	Everyone
9	Being aware of Cyber Frauds & Scam	Identify frauds, and safeguard yourself from modern-day financial scams.	2+	90	Everyone
CATEGORY 2: Grow Your Wealth: Advanced Investing Track (For mid and senior employees ready to move beyond the basics and grow wealth strategically)					
10	Filing Your Taxes the Right Way – Step-by-Step ITR Workshop	Income Tax Filing walkthrough - ITRs 1, 2,3 ; Form 16, AIS, TIS & Form 26AS, Capital Gains vs Losses, Tax Optimization, Common Mistakes & Key Deadlines	2+	90	Everyone
11	Credit Card Wizardry – Points, Miles & Free Travel	Advanced session with real-life hacks and case studies on redeeming points for flights, hotels, and upgrades. Learn how some people travel free using rewards.	2+	90	Mid and Senior Management
12	Fundamentals of Direct Equity investment, Stock Selection	Equity Invesments, Choosing the right Stocks for Long-term growth - Fundamental Vs Technical Analysis, Various Investing Approaches , Investments in REITs, ETFs	3+	120	Mid and Senior Management
13	Advanced Mutual Fund Strategies	Learn to evaluate equity, debt, and thematic funds using rolling returns, portfolio overlap, other key performance indicators, Rolling Returns	3+	120	Senior Management
14	Beyond Boundaries – New Age Investment Frontiers	Explore crypto, commodities, and global equities, their role in portfolios, risks, taxation, and how senior investors can diversify beyond traditional assets.	3+	90	Mid and Senior Management
15	Securing your Future - Successsion Planning	Will Creation - Nominee vs Legal Heir, Rebalancing Portfolio, Self analysis on Quarterly basis, Additional Hacks on All Personal Finance topics	2+	90	Mid and Senior Management
CATEGORY 3: Life Events & Long-Term Planning (High-emotional-impact sessions that employees genuinely value)					
16	Mission ₹1 Crore: Your First Big Wealth Goal	The 1 Crore Playbook: Build Wealth with Simple, Predictable Systems Age-wise investment roadmap, SIP calculators, power of compounding, mistakes to avoid, and a live "build your 1 Cr plan" activity.	5+	90	Everyone
17	Retirement Planning done Right - FIRE Movement in India	Retirement Planning + Products that can be Utilised (NPS, EPF, VPF, Gratuity) Calculating & Investing, Parking retirement funds once received	3+	90	Everyone
18	Parent Syndrome – Planning for Child's Future & Beyond	From childbirth costs to insurance & education planning — a must-attend session for young professionals preparing for or new to parenthood.	3+	90	Parents or about to be Parents
19	Optimizing Loans - EMI Jungle – BNPL, Multiple EMIs: Juggling with Loans	Break free from loan overload - pay off home, car & other loans faster. Understand the real cost of EMIs & Buy Now Pay Later, and avoid debt traps.	3+	90	Mid and Senior Management
20	Policy Padega India — A PennyBloom Initiative	How to be away from bad legacy policies If already enrolled, how to exit.	3+	90	Everyone
CATEGORY 4: Engagement, Gamification & PennyBloom Signature Series (Fun, interactive, high-attendance sessions that boost engagement)					
21	The Great Money League - Intra Corporate Quiz Competition	An engaging competition-style quiz that tests financial literacy, money myths, tax trivia, investing basics, and workplace money habits.	NA	120	Everyone
22	Finance Bola – The Money Housie – Where Finance Meets Fun & Bollywood Beats	Tambola with a musical twist! Guess iconic Bollywood songs tied to money moments — from salary day and tax season to EMI blues and wedding budgets. Mark your tickets as you guess the song and the money moment behind it. A perfect mix of fun, nostalgia, and learning!	NA	120	Everyone
23	AI x Money Mastery – Spot & Fix Your Financial Mistakes	A hands-on session where employees use AI to identify mistakes in investments, insurance, loans, credit cards & create personalised plans.	5+	90	Everyone
24	The Family Money Game	A 12-month financial simulation bringing parents and children together for fun, learning, and family time.	NA	60	Families