

MoneyOwl Financial Literacy Workshop

A 1-day in-person workshop to gain financial clarity and make confident money decisions



Most people make financial decisions without knowing the numbers behind them. How much insurance cover do you actually need? Are you on track for retirement? Should you follow your friends' investment tips?

This workshop will help you to understand key numbers, concepts and decisions that shape your financial future.

Through interactive activities and hands-on use of MoneyOwl's tools and calculators, you will gain practical insights and clear next steps across saving, insurance, investing, CPF and legacy planning.

Why This Workshop

This workshop goes beyond financial planning theory. Get hands-on with your own numbers, gain clarity on where you stand, and leave with practical takeaways and actions you can put into practice today.



1. Learn by doing

Use financial calculators and interactive tools to apply what you learn to your own financial situation.



2. See how it all fits together

Understand how savings, insurance, CPF, investing, and legacy planning work together in your financial plan.



3. Relevant at every life stage

From starting your career to raising a family or preparing for retirement, gain clear insights that fit your financial priorities.



Take Home Your Personal Financial Snapshot

At the end of the workshop, you'll receive a personalised overview document of your financial position, key planning insights and practical next steps, all in one place.

Workshop Curriculum

These five modules will cover a different part of your financial life, helping you connect the dots from everyday money decisions to planning for the future and beyond.



BUILD THE FOUNDATION

Basics of Financial Planning

Know where you stand before growing your wealth. This module will help you understand your current financial position, build smarter money habits and see how small decisions today can shape your financial future.

What you'll learn:

- Assess your own financial health.
- Improve your financial health with good money habits.

MoneyOwl Tools used in this module:

- Savings Ratio Calculator
- Emergency Fund Calculator
- Savings Goal Calculator



PROTECT WHAT MATTERS

Fail-Proofing your Financial Plan: The Role of Insurance

Insurance will protect your financial future when life takes an unexpected turn. Learn how much protection you'll need, spot coverage gaps and make informed decisions, while paying as little as possible for the protection you need.

What you'll learn:

- The role of insurance in your financial plan.
- Assess how much insurance you need.
- How to build a cost-effective insurance portfolio.
- Avoid common mistakes when purchasing insurance.

MoneyOwl Tools used in this module:

- Insurance Calculator



BUILD YOUR RETIREMENT FOUNDATION

Your CPF: Your Financial Foundation

CPF will support your financial needs throughout life, from housing and healthcare to retirement. You'll learn how the different CPF accounts work together, and how to make the most of your CPF savings as a foundation for long-term financial security.

What you'll learn:

- Understand the purpose of the different CPF accounts.
- Learn how CPF supports your retirement, housing and healthcare needs.
- Understand the options available to build your retirement savings, including CPF transfers and voluntary top-ups.
- Learn the key considerations when investing your CPF savings.

Workshop Curriculum



GROW YOUR WEALTH

Investing with Confidence

Investing doesn't have to be complicated. You'll learn how low-cost, diversified investing can help you build wealth steadily, while avoiding unnecessary fees, trends and risks you may not fully understand.

What you'll learn:

- Principles of disciplined, long-term investing.
- Why diversification and low costs matter.
- How investor behaviour can affect investment returns.
- Build an investment strategy aligned with your goals and risk tolerance.

MoneyOwl Tools used in this module:

- Investment Risk Profiler



LEAVE NOTHING TO CHANCE

Legacy Planning

Legacy planning will help ensure your wishes are respected and your loved ones are cared for. You'll learn about the key planning tools in Singapore and how to prepare for life's uncertainties.

What you'll learn:

- What happens to your estate upon death
- Unintended consequences of intestacy



By the End of This Workshop, You'll Have

A Personal Financial Snapshot summarising your current financial position and practical next steps.

A clearer understanding of your overall financial situation.

Course Fees

\$600 per person *

Corporate groups - Write to us for group rates and invoicing

Final session details will be shared prior to confirmation. No commitment is required at this stage.

* Fees stated are inclusive of prevailing GST.

Reserve Your Seat!

Your financial future starts with one decision. Register your interest and we'll be in touch with workshop dates, venue details, and everything you need to know before the day.

Email: partnerships@moneyowl.com.sg

Who Is This Workshop For?

Financial literacy is not just for the wealthy or finance-savvy. This workshop is designed for every Singaporean who wants to make better decisions with their money regardless of age, income, or background.

Career Starters (Aged 20s)

Just starting out and want to build the right habits from day one - before debt, lifestyle inflation, or missed CPF opportunities catch up with you.

Peak Career Earners (Aged 30s-40s)

Juggling mortgage, children's education, and retirement savings. Learn how to prioritise, protect, and grow your wealth in the middle years.

Anyone Without a Plan

You earn an income but have never sat down to map out your financial future. This workshop gives you the structure and tools to start today.