

# CONTRACT kapital

---

## FINANCIAL LITERACY & INVESTMENTS CURRICULUM (COACHING)

Financial coaching focuses on helping clients attain financial freedom, get out of the rat race, and work for pleasure and joy, not for bills and debts. Financial coaching is a one-on-one relationship in which the coach works to provide encouragement and support aimed at facilitating attainment of the client's financial plans. The coach looks at clients' behaviour, family, social values, cultural beliefs, religious affiliation, and helps create a plan that is suitable, acceptable, and practical. They then monitor their clients' progress over time and hold the client accountable. As an expert, you will be suggesting financial advice and information to clients on how to acquire money, manage money, and use money in such a way to reduce their expenses and liabilities, and increase their income and assets.

The details include:

### SESSION 1: FINANCIAL LITERACY FOR FINANCIAL FREEDOM

- £ FINANCIAL FREEDOM!
  - \$ *What Is Financial Freedom?*
  - \$ *The Need to be Rich!*
- £ FINANCIAL LITERACY & FINANCIAL INTELLIGENCE!
  - \$ *What Is Financial Literacy & Financial Intelligence?*
  - \$ *Why Financial Literacy & Intelligence?*
  - \$ *Scope of Financial Literacy & Intelligence?*

### SESSION 2: FINANCIAL LITERACY-MONEY ACQUISITION

- £ THE OJJO 9-WAYS OF ACQUIRING MONEY
  - \$ *Others (Gift/ Begging/ Borrowing/Inheritance/Marrying/Winning/ Stealing)*
  - \$ *Creating (Employment/Money Making Machine)*
- £ MONEY MAKING MACHINES
  - \$ *Business (Entrepreneurship)*
  - \$ *Investing*

### SESSION 3: FINANCIAL LITERACY-MONEY MANAGEMENT

- £ BUDGETING MY MONEY (*The Ojjo 10% Budget Plan*)
- £ SAVING -2-INVEST MY MONEY
- £ INVESTING MY MONEY (*3 Investment Vehicles & 9 Fundamental Principles of Investing*)
- £ BORROWING & LENDING MONEY (*Credit & Debt*)
- £ TAXES & TAX PLANNING
- £ ESTATE PLANNING (*Wills, Gifts, Trusts, Powers of Attorney & Co-ownership of Property*)
- £ EMERGENCY PLANNING/INSURANCE (*The Five (5) Emergencies of Life*)
  1. *Life Insurance*
  2. *Health Insurance*

---

## ContractKapital

Plot 8-10, 8<sup>th</sup> Floor, Uganda House, Kampala, Uganda. P. O. Box 4215,  
Tel: +256 41 4696004/0703 010052 E: [invest@ContractKapital.com](mailto:invest@ContractKapital.com) W: [www.ContractKapital.com](http://www.ContractKapital.com)

# CONTRACT kapital

---

3. *Retirement Planning (Pension Funds)*
4. *Children Education Plan*
5. *Property Insurance*

## **SESSION 4: FINANCIAL LITERACY-MONEY USE**

- £ Destroy
- £ Spending (*the Ojijo 10% Budget Plan*)
- £ Charity
- £ Investing
- £ Saving

**Duration:** 14 Hours (7 Sessions of 2 Hours Each)

**Cost:** UGX. 300,000

---

**ContractKapital**

Plot 8-10, 8<sup>th</sup> Floor, Uganda House, Kampala, Uganda. P. O. Box 4215,  
Tel: +256 41 4696004/0703 010052 E: [invest@ContractKapital.com](mailto:invest@ContractKapital.com) W: [www.ContractKapital.com](http://www.ContractKapital.com)