



## **Individual Financial Counselling**

For Employee Performance Enhancement

### ***Service Outline***

In order to render a consultation that is relevant to each member's needs and circumstances, an employee first completes a **Personal Financial Planning Data Profile (PFPDP)**. This is designed to assemble the financial data of a client, in such a way as to facilitate a **financial needs analysis** and a preliminary assessment. Accordingly, the following Service Outline is pursued:

1. Processing of the Personal Financial Planning Data Profile
2. Preliminary Analysis
3. Interview and Counselling Session, for approximately an hour
4. Confidential Summary Report

A member completes the PFPDP and returns same to the Providers, prior to setting an appointment for an individual consultation. When returning the completed PFPDP, any additional information relevant to the member's case should be attached. The Providers will then complete the preliminary analysis.

At the confidential counselling session, specific advice and recommendations will be given in the light of the member's objectives, specific needs and circumstances (i.e. debt service management, wealth accumulation needs etc.). A confidential summary report is prepared for each member. It should be noted that no information contained in this report shall be discussed with the employer, without the written consent of the employee. The report provides an effective working tool for the individual employee. The service as herein outlined is estimated to require 2.5 hours of a consultant's time.

The service described herein can be easily integrated into an Employee Assistance Programme referral system. By so doing, each member can establish a confidential client relationship for on-going reviews and guidance.

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