



# Managing Personal Finances

Managing Personal Finances - Online  
Training Course - CPDUK Accredited



Corporate  
Member

The CPD Certification Service



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## OVERVIEW

Welcome to The Mandatory Training Group's online Managing Personal Finances training course. All our online training courses, programmes and qualifications are accredited by the CPD Certification Service (CPDUK).

For many people, finances are an unsolvable Rubik's cube filled with anxiety. We don't teach children when they are young the value of a good credit score. Many people have a hard time formatting and sticking to a budget. You can easily solve the finance puzzle with a little hard work, self-control, and the right tools. Today is a new day; you are taking the first steps to reclaim your financial freedom.

Most people know that a map can tell them how to get from point A to point B. A well-developed budget is just like a map because it helps you to reach your financial goals. You start at point A, and the budget helps you go the distance get to point B. And with our online Managing Personal Finances training course, participants will learn how to budget, and create a plan for their future.

### Managing Personal Finances – E-Learning Course — CPDUK Accredited

- ◆ Study method – Online, self-paced
- ◆ Estimated duration (Indicative CPD hours) – 4 hours
- ◆ Course format – Online (24/7 access)
- ◆ Entry requirements – no prerequisites required
- ◆ Assessment type – Complete end of course assessment (80% needed to pass and gain CPD certificate)
- ◆ Certification/Qualification – Downloadable CPD certificate
- ◆ Cost(s) of assessment and certification – Assessment and certification costs included in the course price
- ◆ Course accreditation – CPD Certification Service (CPDUK)
- ◆ Course access – Part-time (1-year access)
- ◆ Course delivery – via desktop PC/MAC, laptops, tablets or smartphones.

### Who is the course for?

There are millions of people around the world struggling with debt. A lot of debt can be alleviated if you have the right tools. This comprehensive Managing Personal Finances e-learning course will provide you with the tools you need to reduce or eliminate debt, and give you the financial stability you need.

### Course aims

This online Managing Personal Finances training course teaches you the benefits of having a budget and how to build a budget that fits your needs, and lifestyle. You will discover how you can cut costs, pay off debts, and live within your budget.



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## Learning outcomes

The learning outcomes of this online Managing Personal Finances training course are to:

- ◆ Discover how to establish financial goals
- ◆ Evaluate where financial cuts can be made
- ◆ Learn the basics about expenses
- ◆ Determine what tools you need to stick with your budget.

## What is covered in this course?

This online Managing Personal Finances training course includes the following:

### Module 1: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

### Module 2: Module Two: The Benefits of Budgeting

- Getting Rid of Debt
- Generating Savings
- Reducing Stress and Anxiety
- Lessening Family Conflicts
- Case Study
- Module Two: Review Questions

### Module 3: What to Consider Before Creating a Budget

- Understand Your Income
- Determine a Budget Duration
- Determine Expenses
- Track What's Being Spent
- Case Study
- Module Three: Review Questions

### Module 4: Types of Fixed Personal Expenses

- Utility Bills
- Housing Bills
- Transportation
- Debt Payments
- Case Study
- Module Four: Review Questions

### Module 5: Types of Fluctuating Personal Expenses

- Personal Care
- Entertainment
- Eating Out
- Case Study
- Module Five: Review Questions

### Module 6: Establish Your Goals

- Short Term vs Long Term
- Be Realistic
- Actually Get Rid of Debt
- Save for the Future
- Case Study
- Module Six: Review Questions

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### Module 7: Determine Where Cuts Can Be Made

- Cut Bad Habits
- Decrease Transportation Costs
- Reduce Utility Bills
- Decrease Entertainment Expenses
- Case Study
- Module Seven: Review Questions

### Module 8: Tools

- Software
- Phone Applications
- The Envelope System
- Expenditure Notebook
- Case Study
- Module Eight: Review Questions

### Module 9: Stick With Your Budget

- Use Cash for Weekly Allowance
- Accountability to Family or Friends
- Set Up a Different Account for Savings
- Remind Self of Benefit to Sticking with Budget
- Case Study
- Module Nine: Review Questions

### Module 10: Additional Ways to Make Money

- Make and Sell Items
- Sell Unused Items
- Small Part-Time Job
- Recycle for Money
- Case Study
- Module Ten: Review Questions

### Module 11: Paying Off Debt

- Get Three Credit Reports
- Start with Small Stuff and Work Your Way Up
- Credit Card Hacks
- Investigate Student Loan Repayment or Consolidation Options
- Case Study
- Module Eleven: Review Questions

### Module 12: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations

## Why is this online Managing Personal Finances training course essential?

Ignorance isn't bliss when it comes to managing your money, it's just downright expensive. This online Managing Personal Finances training course helps you understand all the key things you have to consider and clear action plans.

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★ ← →  
**Learn. Develop. Comply**

## HOW IT WORKS

### Instant Access

- Gain instant access to your course(s) upon purchasing through our website
- Login credentials are sent immediately to the customer to the email address provided during the checkout process
- We also advise all customers to check their spam and junk mail folders in case your mail server has diverted the email there

### Online Support 24/7

- Customer service teams interact with clients through email and live chat support.

### Refund policy

- To request a refund, you should email our support team with your receipt stating why you would like to be reimbursed.
- You, or your learners, must not complete the training to make a valid refund claim.
- Any courses that have been completed and those with certificates achieved will not be valid for a refund.

### Learn Anytime, Anywhere, On Any Device

- Learn at your own pace, at a time and place convenient to your circumstances
- Individual learners can access their course material(s) 24/7 for 365 days from the date of purchase
- In the case of organisations that order multiple licences for future use, the countdown will start when learners are allocated to the training course(s)

### Assessment and Certification

- Unlimited attempts to complete end of course assessments
- On successful completion, download, print/save quality-assured CPD certificate

### 100% Money Back Guarantee

- We want you to be completely satisfied with your training. We offer a 14-day money-back guarantee if you are not 100% satisfied.



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## ACCREDITATION

### End of course assessment

At the end of this course, learners are required to complete an online end of course assessment. On successful completion of the assessment (80% pass mark), learners may download a FREE CPD certificate from their profile page.

### Certification

On successful completion of this e-learning course and end of course assessment, the learner may download, save and/or print a quality assured CPD certificate (recognised internationally). Our CPD certificate can be used to provide evidence for compliance and audit or Continuing Professional Development (CPD).

### Course accreditation

The CPD Certification Service accredits all our online training courses and programmes as conforming to universally accepted Continuous Professional Development (CPD) guidelines.



The banner features the CPD logo on the left, which includes the text 'Mandatory Training Group' below it. In the center, the text reads 'Corporate Member' in a large font, followed by 'The CPD Certification Service' and 'CPDUK Corporate Membership Number- 11177'. On the right, the 'CPD CERTIFIED' logo is displayed, with 'The CPD Certification Service' and 'Collective Mark' underneath.

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## WHY CHOOSE OUR ACCREDITED E-LEARNING COURSES?

The benefits of using our accredited e-learning courses in the workplace include:

- CPDUK accredited e-learning provider
- Ofqual approved training centre (UK qualifications)
- Internationally recognised CPD and Ofqual approved certificates
- Wide range of courses and qualifications that meet UK legislation and guidelines
- Over 500 online courses and programmes that cover multiple sectors
- Free blended learning environment for individuals and organisations
- Immediate access to online courses and programmes
- Highly interactive e-learning portal
- Substantial cost reductions (no travel fees and other expenses)
- Self-paced online learning
- Low carbon footprint through e-learning
- Repository of online learning materials and assessments
- Fully qualified and experienced trainers, instructors and assessors
- Experienced subject matter experts and content developers
- Conversion of existing classroom courses to e-learning courses
- All training courses meet the latest guidance and best practice recommendations.



### Civility in the Workplace Training Course for Global Executives

*"YPO is the premier global leadership organisation for more than 28,000 chief executives in over 130 countries and the global platform for them to engage, learn and grow. We approached The Mandatory Training Group to develop an online training programme focusing on improving workplace civility. Their team developed excellent learning materials tailored to our organisational needs. With their support, we rolled out the civility in the workplace training programme to over 300 executives around the world."*

Nicolle Billmyre, YPO, Texas, USA



### City and Hackney

Clinical Commissioning Group

### Counter Fraud, Bribery and Corruption Training for NHS Providers

*"NHS City and Hackney Clinical Commissioning Group (CCG) is an NHS organisation led by local GPs. The Mandatory Training Group provided us with tailored courses focussing on tackling fraud, corruption and bribery for all our staff across various sites. The e-learning courses helped us to meet statutory and regulatory requirements".*

Harriet Griffiths, NHS City and Hackney CCG, London, UK

### Accredited Training Courses, Programmes and Regulated Qualifications



*"Reed is the largest platform for jobs, recruitment and courses in the UK. The Mandatory Training Group is one of our most trusted providers of continuing professional development (CPD) programmes and regulated qualifications. They have provided us with a wide range of learning materials ranging from soft skills, personal development, health and safety, among others. These courses help many job seekers to improve their skills and comply with the current UK and European laws".*

Mansh Bhatti, Reed Courses, London, UK



*“When we set up our business, we were looking for a reliable training provider for the healthcare multi-disciplinary team (MDT). We worked with The Mandatory Training Group to establish our training needs for each group of professionals. Their experience was invaluable, helping us to design new courses and assessments to meet the commissioners' and regulatory requirements”.*

Anne Joy, OSD Healthcare, Hemel Hempstead, UK



Healthcare choice for **everyone** **Statutory and Mandatory Training for Healthcare Providers**

*“All our senior clinicians were delighted with the delivery of the mandatory training courses. They found the course leaders to be very flexible with allocating more time to certain areas at request. The course contents that LearnPac had designed were tailored to our workforce, which helped them improve their understanding of the subjects. The application of legislative concepts to practice was excellent”.*

Sophie Hartley-Jones, OneHealth Group, Sheffield, UK

## Online Training and Development for the Public Sector



*“We work with various public sector organisations. Statutory and mandatory training is essential for all our placements. We used LearnPac for the blended learning environment they provide for our staff. The online statutory and mandatory training courses adequately meet our regulatory requirements. LearnPac's learning management system enabled us to manage our learners and quickly sort out compliance for our workers. The flexibility of pricing and meeting our needs with the mandatory training was beneficial.”*

David Sanchez, Eden Brown Synergy, London, UK



## Blended Train the Trainer Courses for Healthcare Providers

*“We were looking to provide resuscitation and first aid training for clinical and non-clinical staff internally. The Mandatory Training Group stood out because they provide comprehensive blended learning solutions. Our internal trainers and facilitators were able to complete the theory training and assessments in advance. The practical sessions were packed with meaningful activities throughout the day. The lead trainers also helped us to complete training needs assessments”.*

Kate McLoughlin, Nuffield Health, Bournemouth, UK

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# LEARN. DEVELOP. COMPLY.

The Mandatory Training Group is the leading UK provider of accredited statutory and mandatory training courses for all sectors, including health and social care, education, local government, private and charity sectors.

We have supported over one million learners to reach their potential through e-learning courses and qualifications using our interactive online learning portal.

## ADDRESS

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## WEBSITE

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## WORKING HOURS

Mon - Fri / 9:00AM - 5:00PM

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