

## Jennifer Huang's WFWPI course: Personal and organizational financial planning and budgeting

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The screenshot shows a Zoom meeting interface. On the left, a presentation slide titled "RETIREMENT PLANNING CONSIDERATIONS" is displayed. The slide content includes:

- RETIREMENT PLANNING CONSIDERATIONS**
- Question: "How long do you need to retire?"
- Factors: "What age?", "How long?", "Lifestyle", "Income", "Expenses"
- Process: "Analyze & Research" → "Develop a plan" → "Implement & Monitor"
- Key Question: "Retirement funding gap?"
- Options: "Public Security", "Private Security", "Social Security", "IRA", "401(k)", "Roth IRA", "Municipal Bond Funds"

Handwritten notes on the slide include "PV = 100,000 / 1.05^t" and "PV = 100,000 / 1.05^t". A small photo of a person is also visible on the slide. On the right, a grid of video thumbnails shows participants, including Jennifer Huang, WFWPI International, and others.

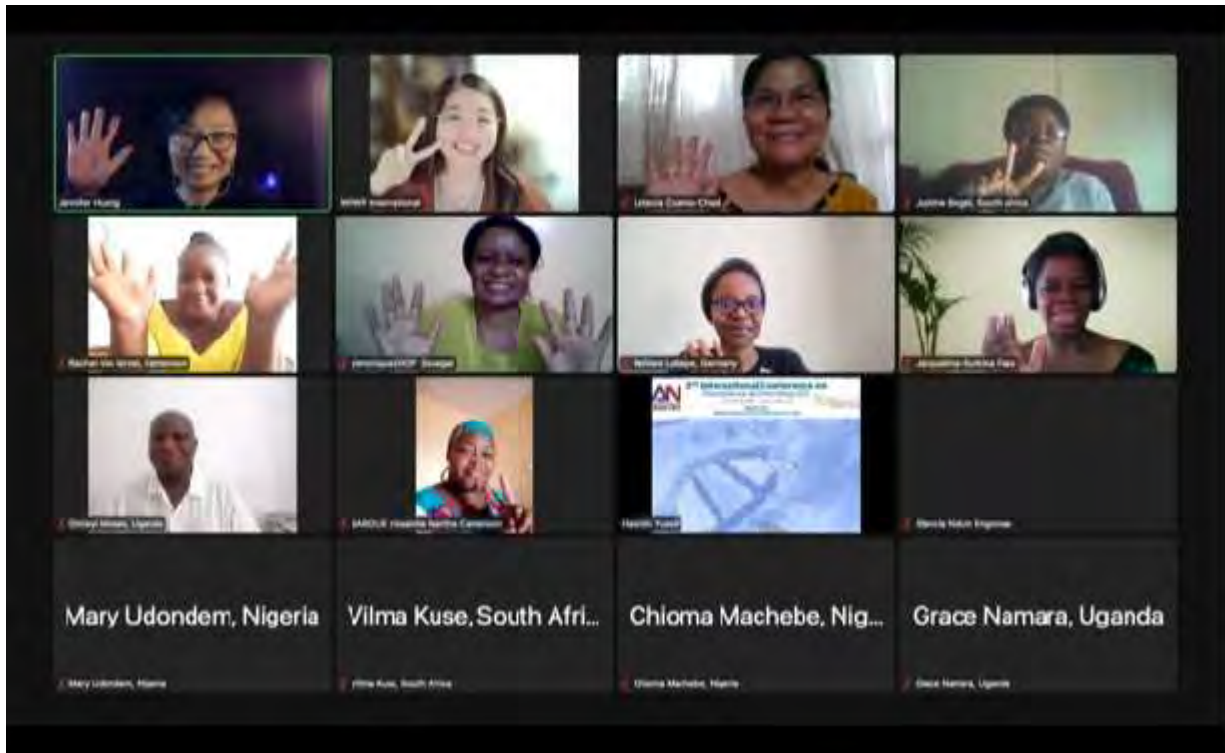
The Women's Federation for World Peace International (WFWPI) hosted two courses, given by Dr. Jennifer Huang, on financial planning and budgeting from June 4 to October 29, 2022. The first course aimed to provide a basic framework for individuals to understand their current financial situation better, identify key areas to improve their financial health, clarify short-term and long-term life goals and develop basic financial strategies to achieve those goals. The second course provided a step-by-step guide for leaders to prepare an organizational budget to spin the wheels and achieve their aspiration goals. It also introduced project budgeting for managers to run a successful fundraising campaign.

The screenshot shows a Zoom meeting interface. On the left, a presentation slide titled "OUR CASE: AFTER AMY'S 5 MAJOR PLANNINGS" is displayed. The slide content includes:

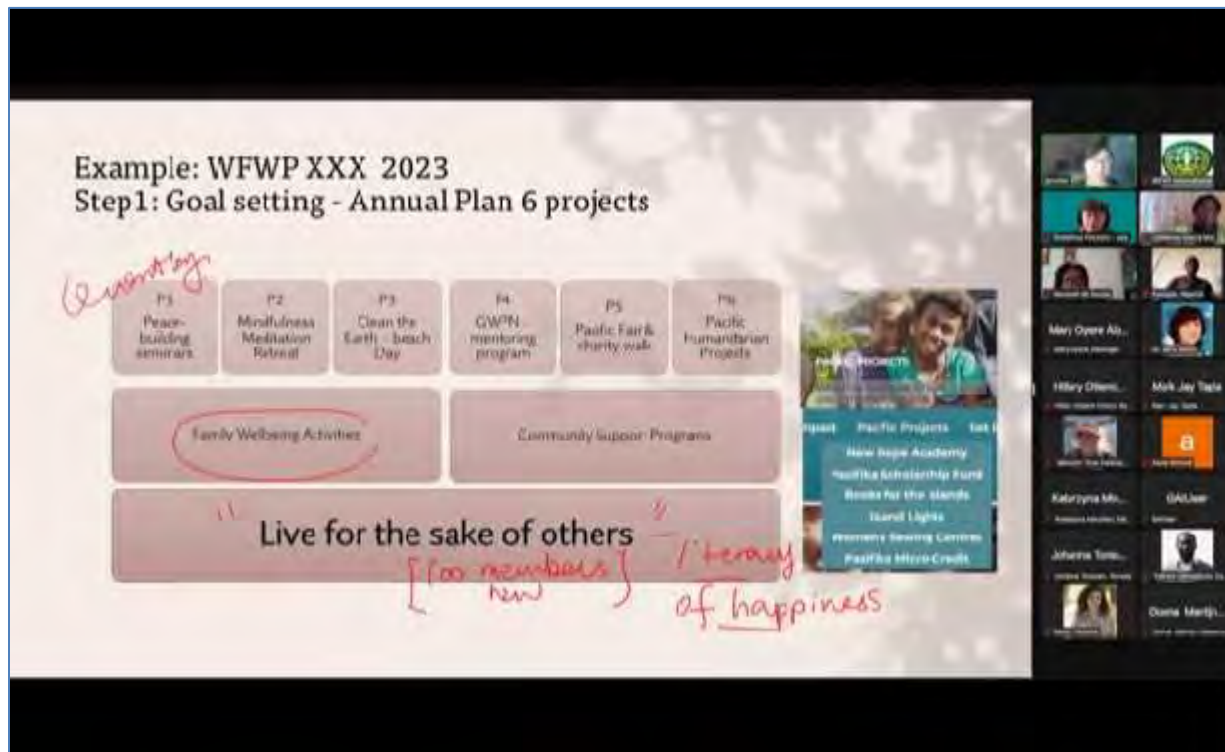
- OUR CASE: AFTER AMY'S 5 MAJOR PLANNINGS**
- Before: Investment planning**
- Debt managed: High-interest debts paid off!
- Emergency fund saving: ready!
- Insurance Planning: Personal risk covered
- Tax planning: Minimized tax
- Retirement saving: Number clarified
- Financial Summary: Total net worth 48,010
- Personal Saving in Pension account (Super): 8,650

On the right, a grid of video thumbnails shows participants, including Jennifer Huang, WFWPI International, and others.

Dr. Jennifer Huang is a finance lecturer and regularly speaks on financial literacy for Generation Z, hosting seminars and workshops from schools to non-profit organizations. Dr. Huang has made it her mission to empower others financially through education. As a former corporate executive in Kaplan Financial and the Walt Disney Company China, she has managed and delivered financial training programs including treasury management, financial planning and credit analysis to thousands of financial professionals and advisors. She realized that many people were seeking financial help but lacked the minimum knowledge to have a meaningful start.



Since 2017, Dr. Huang has dedicated herself to helping young students and women to build a financial foundation by offering practical financial courses focused on topics like investment management and personal wealth management. She holds a doctorate degree in banking and finance from RMIT University Australia. She is an Associate Financial Planner and Certified Treasury Professional. She has served as a board member of the Financial Planning Standards Board Ltd. and is a member of the Financial Planning Association Australia. Dr. Huang is also a member of the Victoria Advisory Committee of WFWP Australia.



The course was intensive and registration was taken for a limited number of seats. Registrants received the full package of course materials, including online lectures and direct WhatsApp consultation communication with the instructor after the course. The course started with an introduction to finance and included a look at skills for knowing, planning and increasing money.

In the last session, Dr. Huang asked several participants to share their organizational project budgets and provided advice and information to help develop them. Dr. Huang also explained how to receive and collect funds from various sources. At the end of the course, all participants who attended 80% of the sessions received a certificate of completion issued by WFWPI.

WFWP IHQ plans to continue to host virtual educational courses in 2023.

## Step3: Income - Plan the funding sources

Available & suitable funding sources

Diversify fundraising strategies

- Member fees
- Small and major donors
- Corporate support
- Government grants

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- In-kind donations, services or grants
- Gov. grants
- Corporate donations
- Individual donations sales of tickets fundraising pitch

Income	Units	\$ per unit	\$ total
<b>In-kind donation</b>			
Venue- XI community center (free-usage)	12	100	1,200
Speakers	2	200	400
Food			
			<b>1,600</b>
<b>Individual ticket sales ( 50% to members)</b>			
Member 50% fee	60	13	750
Non-member (full price)	60	25	1,500
	120		<b>2,250</b>
<b>Total income</b>			<b>3,850</b>

\*\*Women's Federation for World Peace International, as an international NGO, provides accessible education to people in need. WFWPI believes education is a very important factor in engaging and benefiting people everywhere. In 2022, WFWPI offered five versatile programs across a wide range of fields, including finance, digital art, NFT production, SNS marketing and healing therapy.