

SAVINGS AND INVESTMENTS PROJECT

I organised a savings and investments project in Mumbai and Jaipur in order to uplift the low-income community, which is not well-versed with different investment tools that are available to them, like mutual funds, index funds, etc.

I followed a 3-module plan in order to uplift the low-income members of society.

MODULE 1: I organised talks in workspaces/ housing societies in Mumbai and Jaipur, emphasising to people the importance of having an alternate income stream and diversifying their financial portfolio. For some of these talk, I was also accompanied by professional wealth managers

MODULE 2: I helped train certain members of the low-income community to promote savings/investments in their households and communities, and this is what eventually tied into the third module.

MODULE 3: This included assisting over 150 members of the low-income community, with the help of the people I had trained, to actually invest in SIPs. I helped them to fill e-forms, including their bank details, and PAN card details.