



kreyon

**Wealth
Management
Portal**



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About Us

We help you unlock your financial success. We do this by increasing your financial intelligent quotient (IQ), and helping you plan for now and the future assisting you to create a roadmap, and continuously assist in the implementation and management of its success.

For us it's not about the products you buy, our comprehensive financial counseling and education services help you strategies and improve your financial life towards creating wealth. After we understand you, your goals and the picture you want to achieve, we help you in the roadmap and continuously watch over, manage and build upon the roadmap to your financial success.

Wealth Management Portal



Our Vision

To be the best partner in personal financial management and wealth creation, and improve the lives of every client, community and business



Our Mission

To establish lasting relationships with our clients, by exceeding their expectations through delivering high standard services with passion and professionalism



Our Values

We believe our clients deserve well classified information to help them make sound financial decisions.

We value our staff and create enjoyable work environment which allows personal development.



Our Services



Financial Education

We enlighten and up skill you, by raising your financial IQ, thus empowering you to make sound financial decisions.



Financial Planning

We help you do a financial road-map, which will enable you to achieve financial success.



Portfolio Management

It is our ultimate goal to see your goals and dreams come to reality, we therefore provide assistance, mentoring, and management in different arrears of your portfolio.



How It Works

Join Our Wealth Management Program

We help you define and create your picture



Financial Education

We give you the advisory services tools to get you started



Portfolio Management

We assist in continuous growth and how to preserve your wealth



Financial Planning

We then assist in implementation and monitoring





Our Products

01

PRESENTATIONS

We do 30-45 minutes presentations on financial education, personal development and wealth creation.

02

WORKSHOPS

We run workshops all year round to empower and help you achieve your goals. We can also customize our workshops to meet your needs either as a corporations or individuals.

03

SEMINARS

You get invited to financial education seminars, where we cover topics such as personal development, emotional intelligence, entrepreneurship, money management.

04

TRAININGS

We run training's on various topics and modules accredited by Botswana Qualification Authority (BQA). Once enrolled in our wealth management program.

05

ONE ON ONE CONSULTATIONS

Once enrolled on the wealth management program, you get unlimited one on one consultations with your financial planner.

06

WEALTH MANAGEMENT PROGRAM

Get all the financial education and tools you need to create wealth. Enrol and make a difference in your life.



Wealth Management Program

How It Flow

We do this by increasing your financial intelligent quotient (IQ).

01

A dedicated financial planner available to you via email, phone and one on one consultation.

02

A free book a year on different topics (financial education, wealth creation, personal development, entrepreneurship etc) .

03

Online tools, advisory services, counseling, and implementation strategies by using our wealth management portal.

04

Attend Wealth seminars on different topics (book a seminar at your convenience)

Wealth Management Portal



We Help You In All Life Stages



New Beginnings

- Getting married
- Buying or building a new home
- Raising children
- Starting a new business
- Investing



Managing Debt

- Controlling debt
- Managing mortgage
- Getting out of debt
- Using good debt

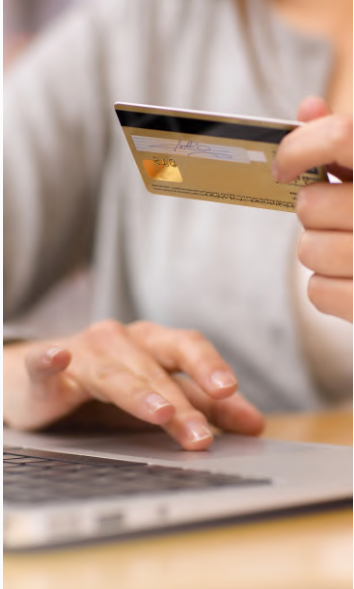
Getting Started

- Investing and saving
- Budgeting
- Good financial habits
- Creating a roadmap



Life's Challenges

- Financial stagnation
- Unemployment
- Making financial decisions
- Personal development

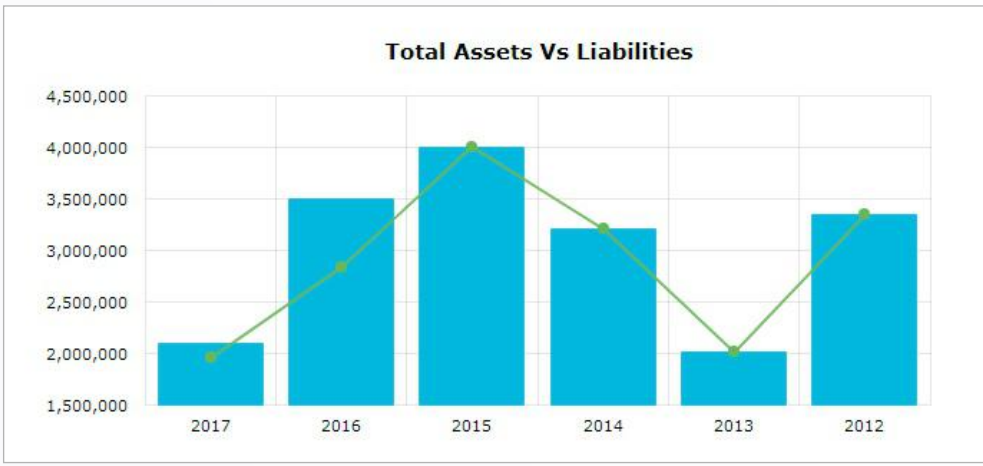




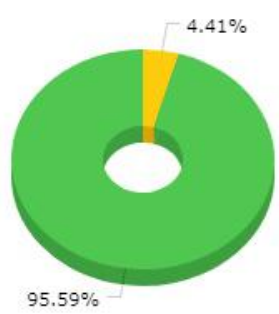
Features

Money Management

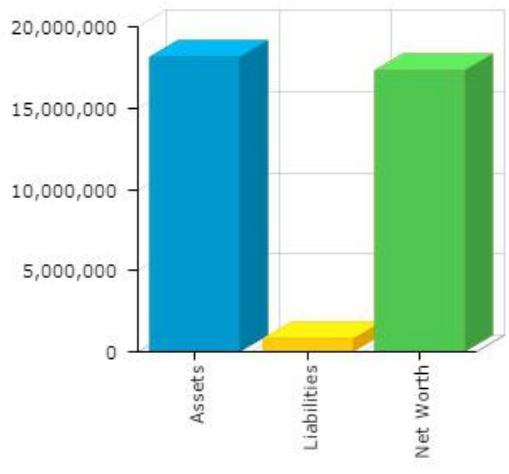
■ Assets
P 18,160,775.00
■ Liabilities
P 801,287.00
■ Net Worth
P 17,359,488.00



Percentage of Liabilities



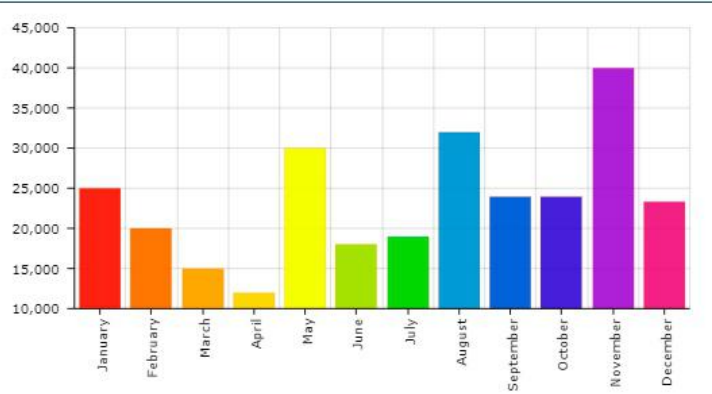
● Liabilities 801,287 ● Net Worth 17,359,488



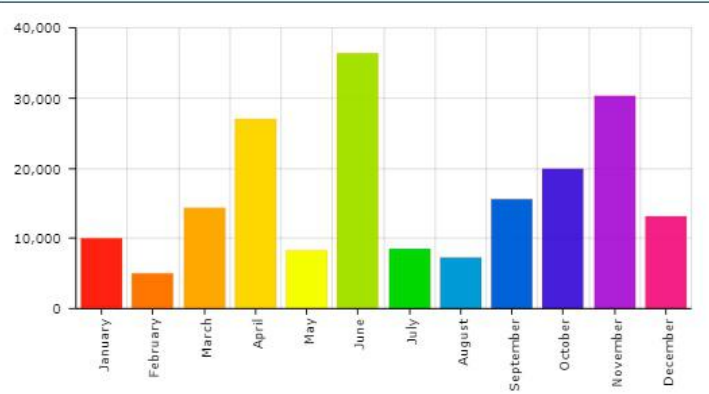


Budget Tool

Monthly Income



Monthly Expenses



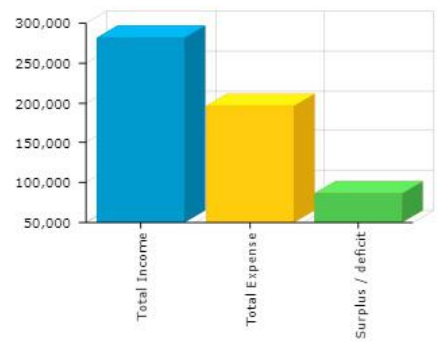
Percentage of Expense



● Total Expense 195,600 ● Surplus / deficit 86,800

Summary

Total Income
P 282,400.00
 Total Expenses
P 195,600.00
 Surplus / deficit
P 86,800.00





Financial Calculators

Financial Calculators

- Loan
- Interest
- Mortgage
- Debt Ratio
- Refinancing

Calculate your Loan

Your Loan Amount	<input type="text" value="P 15,00.00"/>
Time Period	<input type="text" value="5"/> <input checked="" type="radio"/> Month <input type="radio"/> Year
Interest Rate Per Year %	<input type="text" value="3.00"/>
Fees and closing costs	<input type="text" value="P 100.00"/>
Loan Start Date	<input type="text" value="Select Date"/>

Your Estimated Monthly Payment **P**



Integrated E-Commerce Portal

<p>MIDWEEK SUN 011 Four weeks subscrip...</p> <p>P 50.00</p>	<p>Sunday Standard 009-Four Weeks subscrip...</p> <p>P 60.00</p>	<p>Gurdian 008- Four weeks subscrip...</p> <p>P 60.00</p>	<p>BUSINESS WEEKLY 000 Four weeks subscrip...</p> <p>P 58.00</p>
<p>FINANCIAL MAIL- weekly 001 Four weeks subscrip...</p> <p>P 156.00</p>	<p>GAZZETE- weekly 002 Four weeks subscrip...</p> <p>P 54.00</p>	<p>MAIL & GUARDIAN- weekly 003 Four weeks subscrip...</p> <p>P 180.00</p>	<p>MMEGI- weekly 004 Four weeks subscrip...</p> <p>P 60.00</p>

Wealth Management Portal



Benefits



Access to a Financial Planner

- One on one consultations
- Email
- Phone
- Live Chat



One free book a year

A book of your choice



Wealth Management Portal

- Online tools and services
- Information centre
- Investing
- Budgeting tools
- Financial Calculators
- Project Management
- Opportunity Recorder
- Goal Setting
- Product Catalogue
- Live chat



Seminars

- Book a seminar
- Personal Finance
- Personal Development
- Entrepreneurship
- Wealth Creation



Thank You



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1298, Jasati Compound,
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