

StanChart & Sanlam Financial Wellness Webinar

Personal Financial Management (PFM)



Webinar Etiquette: Rules of Engagement

Use earphones or headphones to avoid distracting your office mates



Join the webinar 5 minutes before start



Use the chat feature on MS Teams to ask a question



Raise your hand and wait to be called to ask a question



Mute your microphone before you join the webinar so as not to interrupt the session



Turn off your camera prior to joining the webinar



Put your phone on silent mode if you want to speak



StanChart Background

- **Standard Chartered** is one of the world's best international banks, leading the way in **Asia, Africa and the Middle East**.
- They have direct **presence in 15 countries** and supporting **transactions in 22 more countries in Sub-Saharan Africa**.
- The Bank serves both Consumer and Wholesale banking customers.
- Their Consumer Bank provides personal loans, mortgages, deposit accounts and wealth management services to individuals and medium sized businesses.



Sanlam Background

- **Sanlam** is one of the biggest internationally active insurance groups in the world, and they have been creating value for stakeholders for **more than 100 years**.
- Classified as a domestic systemically important financial institution in South Africa, Sanlam operates across a number of selected global markets and contributes to the financial resilience and prosperity of its clients and the markets in which we operate.



Personal Financial Management Webinar Topics

- Financial Wellness
- Needs vs. Wants
- Credit Management
- Financial Independence
- Wealth and Investment
- Protection of Wealth

Our Facilitators- StanChart



STEPHEN KAGIRI

Stephen Kagiri joined Standard Chartered Bank in 2013 and has served in various capacities in the last 7 years, most recently as Financial Advisor in Wealth Management and Personal Finance. Equipped with excellent audience engagement and content delivery skills, he is an ardent trainer and facilitator with a bias in Financial Literacy and Advisory. He is Certified with an Executive Certificate of Proficiency in Insurance and holds a degree in BSc Meteorology.





PAUL NJOKI

Paul Njoki joined Standard Chartered in 2013 and is the Head of Wealth Management at Standard Chartered Bank for Kenya and East Africa, and CEO of Standard Chartered Investment Services Limited. He was appointed to the role in 2017. Paul has worked for HSBC as head of Global Banking and Markets (Treasury) Finance in Bermuda. He started his career in audit where he worked for leading global audit and consulting firms, Deloitte and KPMG. He holds a graduate degree in Engineering and Applied Accounting.



Our Facilitators- Sanlam



JACQUELINE KARASHA

Jacqueline Karasha joined Sanlam Kenya in 2013. She has 13 years of operational and sales experience in the insurance industry with focus on corporate business-employee benefits. Her role extensively covers the areas of relationship building, developing attractive benefit solutions for clients, supporting and developing the various distribution channels that supports the business. She leads a dynamic team that is mandated to drive strategy and business growth to position Sanlam as a reputable insurance provider.



SC & Sanlam team in the webinar

Kenya Team

Anne Mungai - SC

Francis Ombese-SC

Christine Kibuna- SC

Laura Mawagi – SC

Scholastica Kiboro- Sanlam

Representatives from other countries in the webinar

- Virginia Moono- Zambia
- May Moses Manumbu- Tanzania
- Emmanuel Biibi- Uganda



Q & A





THANK YOU