



Republic of the Philippines
Department of Education
Region III
SCHOOLS DIVISION OF PAMPANGA

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January 09, 2024

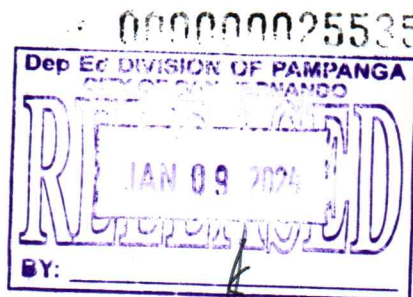
In compliance with DepEd Order No. 8, s. 2013 this advisory is issued not for endorsement per DO 28, s. 2001 but only for the information of DepEd officials, personnel/staff, as well as the concerned public

PROSERVE FINANCIAL SERVICES AND CONSULTANCY

Attached herewith is the letter from Albert Ryan C. Dungca, RFP, Head, Registered Financial Planner of Proserve Financial Services & Consultancy, offering Financial Wellness Program to DepEd officers, teachers, employees, parents and staff in the SDO Pampanga through presentations of topics and modules focusing on financial goal setting/management/literacy, wealth building, protection and distribution and retirement planning.

Participation of the activity is purely VOLUNTARY.

For your information and guidance.



January 08, 2024

DR. ROMEO M. ALIP, Ph.D., CESO V

Schools Division Superintendent
DepEd Division of Pampanga
High School Boulevard
City of San Fernando, Pampanga

Dear **Dr. Alip**:

After having experienced the effect of a health crisis like the Covid-19 pandemic, a lot of our fellowmen have realized the value of financial preparedness and financial security. More organizations are also challenged on whether the company can afford to provide their employees additional benefits to help them survive and get through a crisis.

We, at **PROSERVE Financial Services and Consultancy** aim to *provide financial security and sound investment options* to groups and individuals in the community.

With this advocacy, we wish to share various **"FINANCIAL WELLNESS PROGRAMS"** to our DepEd officers, teachers, employees, and staff in the province of Pampanga through **presentations and/or series of lectures and workshops**. These activities will be at no cost to your organization. These programs and pocket sessions may also be conducted to parents and students to various schools in our province. This may take about 30-45 minutes per session and may be presented onsite or virtually.

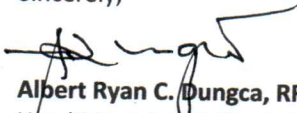
Some of the topics and modules that we could focus on are as follows:

- a. **Financial Goals Setting**
- b. **Basic Money Management**
- c. **Budgeting and Debt Management**
- d. **Wealth Building**
- e. **Wealth Protection and Distribution**
- f. **Retirement Planning**
- g. Other matters that would further gear up the **financial literacy** of our fellowmen

We believe that employees (teaching and non-teaching personnel), parents and students can be more engaged and productive when they are able to manage their finances well, free of debts and financially secured, which will result to higher productivity, peace of mind and independence.

Thank you, and I look forward to a more fruitful partnership with your organization.

Sincerely,



Albert Ryan C. Dungca, RFP®
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Our partner affiliates:

