SERRARI

Money & Life Transformation Blueprint™ Program & Wealth Builder Platform

Turn employee financial stress into workforce performance.

A premium financial wellness, wealth management and financial literacy program designed to help organisations build more focused, resilient and financially confident teams.

Attention Business Leaders & Owners, CEOs, HR, L&D and Finance Leaders!

Serrari Financial Wellness & Wealth Builder™ Platform
Money & Life Transformation Blueprint™ Program

Financial Wellness = Happy Workforce = Higher Engagement = Higher Productivity

ENTERPRISE SALES DECK

Kenya has access to money — but not enough financial health.

The financial stress your employees bring to work is not theoretical. It is structural.

84.8%

Adults financially included in Kenya (2024)

18.3%

Kenyans financially healthy (2024)

17.1%

Able to invest in future goals in 2024

≈38%

Estimated financial literacy level cited in Serrari fundraising materials

Access is high. Wealth-building capability is not. That gap is where financial stress, reactive borrowing and weak long-term planning show up inside the workforce.

Kenya has built access (mobile money, fintech)… but not understanding.
This creates **misuse, debt cycles, and poor financial decisions at scale.**

Implication for employers: financially included employees can still be financially anxious, distracted and underprepared for the future.

Financial Wellness = Happy Workforce = Higher Engagement = Higher Productivity

Why employers should care now

Financial stress shows up in productivity, retention, benefits uptake and workforce confidence.

56%
of financially stressed employees who are distracted at work spend 3+ hours weekly on money issues

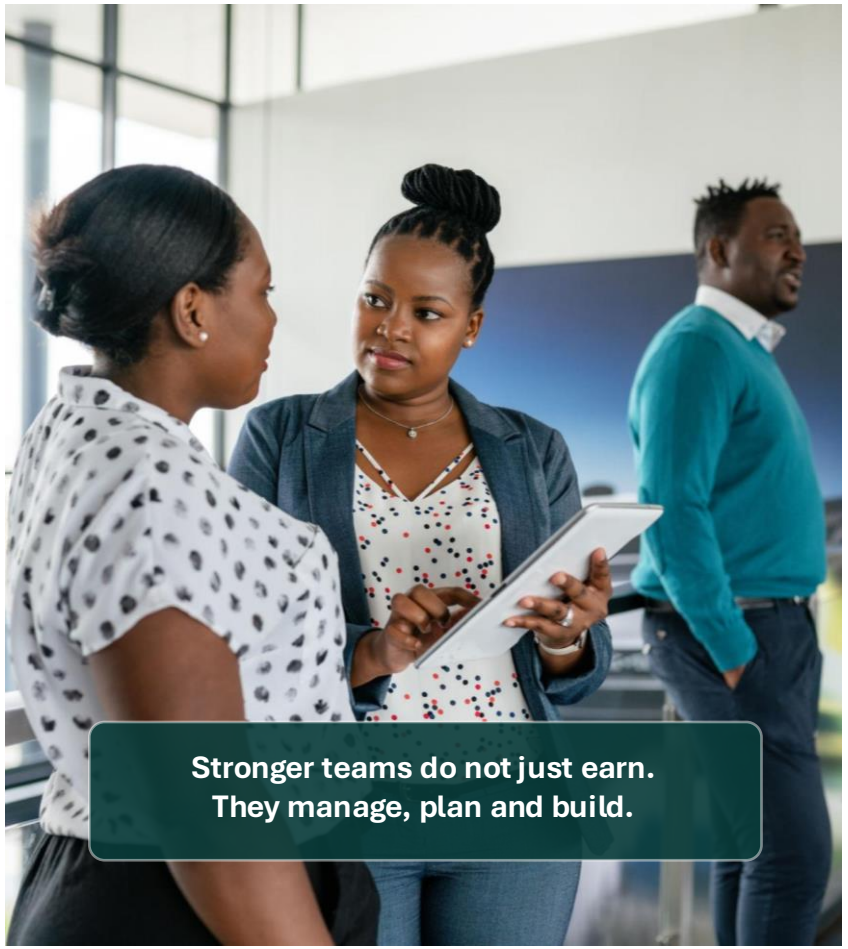
2x
more likely to be looking for a new job when financially stressed

81%
of workers are more likely to stay with employers offering more financial wellness benefits

The business case

When employees are financially stressed, organisations pay twice: once in lost focus today, and again in weaker retention, morale and future-readiness.

- Productivity leakage from money anxiety, debt stress and reactive decision-making
- Higher churn risk when employees do not feel supported in real life
- A stronger employee value proposition when financial wellbeing becomes a visible benefit



Selected sources & references

1. CBK / KNBS / FSD Kenya — 2024 FinAccess Household Survey (financial inclusion, financial health, future-investment capability).
2. AFI coverage of Kenya FinAccess 2024 and National Financial Inclusion Strategy launch (financial inclusion and financial health framing).
3. PwC 2023 Employee Financial Wellness Survey (productivity distraction and job-search risk).
4. PNC Organizational Financial Wellness report 2025 (retention value of financial wellness benefits).

About Serrari

One ecosystem. Three growth engines built to turn income into wealth with more clarity, discipline and confidence.

01 Serrari Advisory

- Growth, strategy and execution support
- Data-driven advisory for businesses and institutions
- Financial health diagnostics and performance visibility

02 Wealth Builder Platform

- Independent market intelligence
- Wealth Builder dashboard and marketplace
- Compare investments, calculate outcomes and invest with confidence

03 Money & Life Online Learning

- Financial literacy and wealth-building programs
- Guided journeys, simulations and templates
- Mobile-first learning designed for practical action

“Turn Your Income Into Wealth.” Serrari helps users know it, compare it, grow it and preserve it — across market data, tools, dashboards and learning.

The Serrari enterprise answer

Serrari bridges the gap between financial education and real-world financial behaviour change.

Education

Practical financial literacy
Behavioural finance
Money psychology
Investing foundations

→

Tools

Assessments
Dashboards
Calculators
Planning templates
Simulations

→

Execution

Savings & debt management systems
Habit design
Action plans
Progress tracking
Confidence building

Behaviour + Systems + Discipline

This is the Serrari difference: not just knowledge, but a structured system employees can actually apply in real life.

What learners get

A structured money-and-life transformation journey designed for practical workplace relevance.

Money & life diagnostics

Scorecards, money psychology, self-awareness and financial health checks

Personal strategy & plan

Values, goals, personal strategy canvas and financial planning tools

Budget, savings & debt management systems

Spend planner, savings automation and debt reduction action systems

Investing foundations & simulations

Practical investing lessons, product comparisons and decision simulations

Market intelligence

Weekly analyst insights, investment comparisons, calculators and market dashboards

Exclusive Wealth Circle

Peer accountability, community support, commitment boards and progress momentum

Templates | Dashboards | Calculators | Guided routines | Action plans | Certification | Annual subscription

Employees move from | confusion → clarity, | stress → confidence, and | survival → disciplined wealth-building behaviour.

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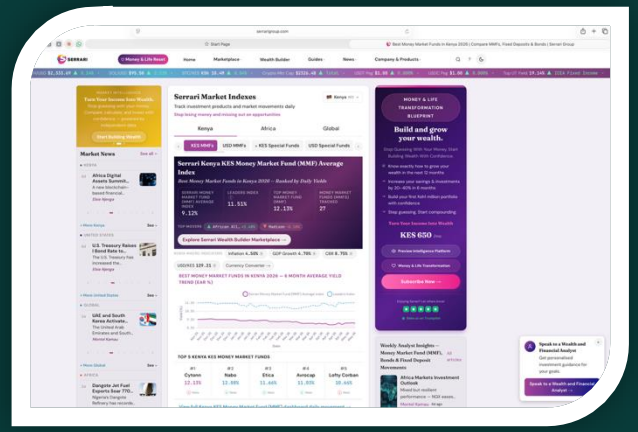
Money & Life Transformation Blueprint™ Program & Wealth Builder Platform

Platform demo

What your teams will actually use.

A guided experience across dashboards, market intelligence and community accountability — designed to help learning turn into measurable financial behaviour.



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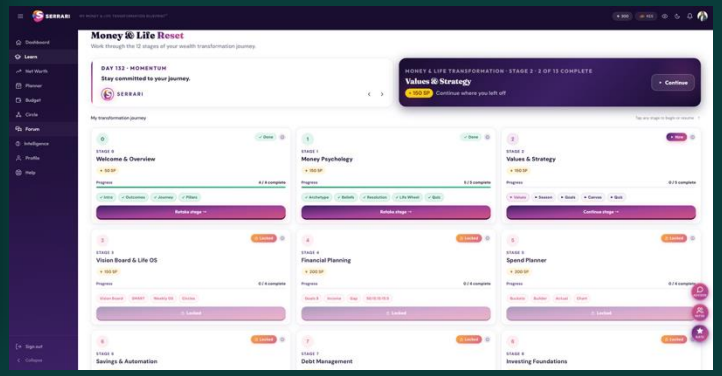

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Money & Life Dashboard

Scorecard
Health Wheel
Net Worth

Market intelligence

Indexes
Analyst desk
Calculators

Wealth Circle

Commitments
Wins
Accountability

Three product layers.
One Financial Wellness & wealth-building journey.

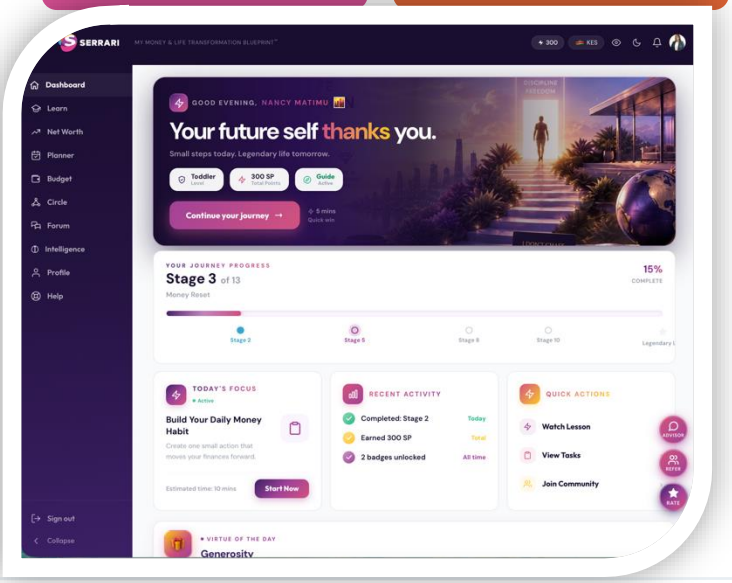
Demo | Money & Life Wealth Builder Dashboard

A personal financial command centre that turns clarity into momentum.

What leaders should notice

- Employees see their current position before they are asked to change behaviour.
- The platform blends self-awareness, planning, action prompts and progress tracking.
- This is how learning turns into routine financial discipline.

Money Scorecard | Health Wheel | Momentum Score | Net Worth Tracker



Serrari Wealth Builder Dashboard

Money Scorecard
82%

Health Wheel

Net Worth
Track growth

Momentum Score
7 / 10

My weekly big 3

- Track spending
- Increase savings bucket
- Complete investing lesson

Progress milestones

Savings buffer | Debt plan | Investment start | Protection

Why this matters: the dashboard keeps employees engaged between lessons with visible progress, weekly actions and a repeatable financial system.

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Demo | Market intelligence & decision tools

Independent data, product comparisons and calculators help employees move from guesswork to informed decisions.

Serrari Markets | representative preview

MMF Index • Bonds • Fixed Deposits • Savings • Forex • Analyst Desk • Calculators

Market indexes

Track top performers across MMFs, bonds, fixed deposits, savings and more.

Compare investments

See product differences side-by-side and understand fit before acting.

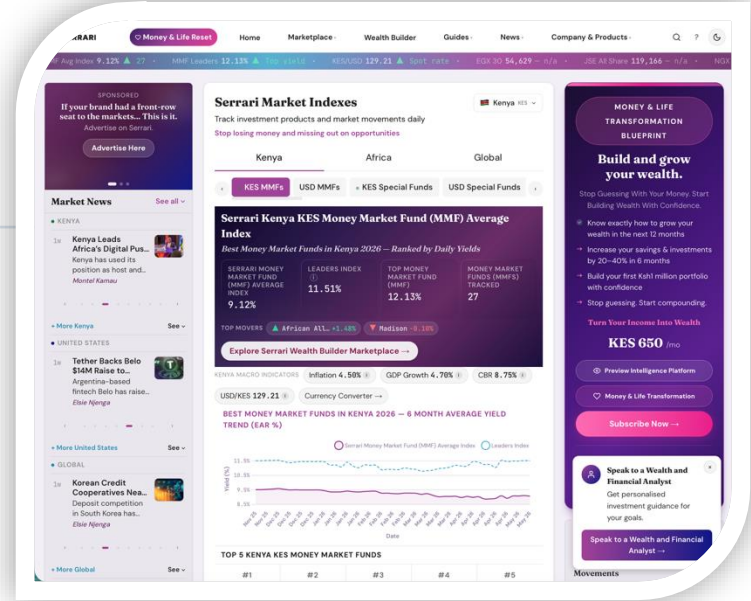
Financial calculators

Net worth, compound interest, savings goals, tax, inflation and more.

Weekly analyst insights

Kenya markets | Africa markets | Global markets

Employees get current market context, product comparisons and decision support — not just theory.



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Why this matters in a corporate program

- S, investing and protection decisions work in the real market.
- Market intelligence increases confidence and reduces reliance on hearsay or hype.
- Fresh insights daily.

Independent data | Compare | Calculate | Decide with confidence

Demo | Exclusive Wealth Circle

Community accountability helps learning stick — and makes progress visible, social and repeatable.

My Wealth Circle | representative preview

Circle 238

Members: 6
Saturday 7 PM EAT

N D F J A

Weekly commitment board

David — Open investment account
Fatima — Track spending for 7 days
James — Exercise 4 times this week

Circle wins this week

14 habits completed
3 financial goals achieved
2 investment milestones

Belonging
Support
Accountability

5–7 peer members • matched by stage, language and time zone • 45–60 minute check-ins • rotating circle guide. Users/Wealth Builders can also build their own circles on the platform

Why this feature matters

- Most people do not fail because they lack information. They fail because they lack accountability and encouragement.
- Wealth Circle turns Serrari into a movement, not just a course.
- This strengthens completion, consistency and peer-led momentum.

https://myserrari.serrarigroup.com/signin

Why each decision-maker says yes

Serrari is designed to satisfy multiple internal stakeholders at once.

CEO

Sharper performance narrative

A more focused, resilient and future-ready workforce.

HR

Higher retention and wellbeing value

A distinctive benefit employees feel in daily life.

L&D

Practical skills employees actually use

Not theory — action plans, systems and measurable behaviour change.

CFO / Finance

Clear ROI logic and stronger financial capability

Less productivity leakage and better workforce financial decision quality.

Enterprise model and annual subscription

Simple to launch. Easy to scale. Built local, regional and global expansion.

What is included

- Employee access to the Serrari program and platform
- Cohort onboarding and internal activation support
- Money diagnostics, dashboards and planning tools
- Market intelligence, calculators and guided templates
- Exclusive Wealth Circle community layer

Kes. 6200/- Annual Access Subscription per Employee

Roll-out model

Start

Discovery + internal alignment

Audience sizing, launch goals, success metrics and execution design.

→

Next

Cohort launch

Employee self- onboarding, activation campaigns and learning rollout.

→

Spot Check

Engagement + review

Usage review, ROI discussion, renewal planning and scale-up.

Designed to remove friction for HR while giving Finance a clear path from onboarding → proof → rollout at scale.

Recommended \ path

Illustrative productivity formula

Affected employees × hours regained per week × 48 working weeks × loaded hourly cost

Every 100 affected employees × 1 hour regained per week × 48 weeks = 4,800 productive hours reclaimed per year before retention and engagement upside.

This formula is illustrative — not claimed client impact.

Rollout-to-Organization-wide Pathway

01
Kick-off cohort
Existing Employee Headcount :>> Enroll Entire Organization

→

02
New Joiners
Include in staff onboarding and induction programs

→

03
ROI
Share the ROI story, adoption insights and employer-brand value from employee testimonials.

→

04
Behaviour Entrenchment
Annual Renewal to enable access to behavior transformation tools

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The ask

Partner with Serrari to build a more financially confident, focused and higher-performing workforce.

Recommended next step: Complete and approve a Serrari Enterprise sales order form and make payment that leads to coupons issuance for your entire workforce, an onboarding and discovery session and enterprise demo and rollout for your teams.

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Salesperson : Nancy Matimu
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Financial Wellness = Happy Workforce = Higher Engagement = Higher Productivity

Turn income into wealth and. Build financial dignity at scale.