

Investing Pays Off

Project for WYCHK

Merill Lynch & Wah Yan College Hong Kong

Executive Brief by WS Lo

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2006/2/3

Suggested modules

- 1. Investing your Future:
 - Put some aside: budgeting (#2)
 - Saving for your education (#7)
 - Work your money: investment options (#6)
- 2. Investing your Life:
 - Life skills: you, your job, your career (#4)
 - Give and Take: the benefits of philanthropy (#9)
 - Leadership: taking charge of your life (#10)

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Approach:

- Spiral curriculum of Level 2 & 3
- For future leaders of WYCHK
- Small-group approach
- A life project for the coming year
- Medium: English supplement with Cantonese

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Time-frame

- 2 cycles: about 4 weeks each
- Recruitment in late Nov 2005
- Screening in early Dec + notification
- 1st cycle: Feb 2006
- 2nd cycle: Mar 2006
- Dates fixed as: 11/2am, 25/2am, 11/3am, 18/3am (about 150min@) + 2x/3 pm for tentative visit to Merrill Lynch

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Target Group:

- 24 Form 2-3 future leaders
- 12 from invitation
- 12 from application
- Selection Panel by PTA & College representatives

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Logistics:

- Personnel involved: Merrill Lynch coaches & one Wah Yan teacher
- Venue: Wah Yan College Hong Kong
- Wah Yan will provide refreshments to coaches for each session & souvenir at the end
- Wah Yan will provide needed stationery & xerox services
- Merrill Lynch will provide coaches & teaching materials

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Sideline considerations:

- Certificate jointly issued by the Merrill Lynch coaches, the College Principal & the PTA Chairman
- A follow-up life project: individual/group?
- Review at 6/12 months?
- A track-down mechanism?
- An alumni organization?