



# Financial Wellbeing Workshops

For over 25 years, The Money Charity has been the UK's Financial Capability charity. We proactively provide education, information, advice and guidance to people of all ages, helping them to manage their money well and increase their Financial Wellbeing.

We have a proven track record of delivering Financial Wellbeing Workshops face-to-face and virtually to a wide range of charity and social enterprise groups, providing their service users, volunteers and employees with advice and training to help them get on top of their money. With Financial Capability lacking in large parts of the population and with **12 million adults in the UK\*** having low financial resilience, this training is needed more than ever. \*FCA

## Workshop Attendees:



“

I liked that information was explained clearly and assumed no prior knowledge. It felt like we were learning as a group.

”



“

I feel so much more confident with how to manage my money now. Before it stressed me out and I didn't know about all the tools that are actually available.

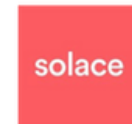
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“

I thoroughly enjoyed the session and opportunities for engaging. The session has motivated me to better secure my financial matters.

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# Workshop Guide

Any sessions for employees will be charged, current prices [available on our Workplace Guide](#).  
Webinars for larger groups, minimum 8 attendees, are available but please contact us to discuss this further.

Theme	Session	Duration (Mins) Virtual	Duration (Mins) Face-to-Face
<b>General Financial Wellbeing Sessions</b>	2-hour Financial Wellbeing Fundamentals	120	120
	1.5-hour Financial Wellbeing Condensed	90	n/a
	1-hour Financial Wellbeing Condensed	60	n/a
	Financial Wellbeing for Young Adults	90	120
	Women & Money	60	90
<b>Spotlight &amp; Thematic Sessions</b>	Budgeting & Keeping Track	60	90
	Credit, Borrowing & Debt		
	Savings & Investments		
	Pensions		
	Wills & Future Planning		
	Financial Resilience & the Psychology of Money		
	Mind Your Money		
	Money Safety		
<b>Refugee Programme</b>	Introduction to the UK Financial System & Banking	120 per Workshop	120 per Workshop
	Budgeting & Saving		
	Credit & Debt		
	Energy		
	Safe Money		

For **registered charities** and **social enterprises**, we can currently offer **two fully-funded (free of charge)** Workshops for your **beneficiaries** or **volunteers**.

Further sessions may also be available fully-funded, including for refugee and asylum seekers; we can advise further on this.

All sessions are available **Face-to-Face** or **Virtually** (via Zoom, or your platform.)  
Minimum duration for Face-to-Face sessions is **2 hours** (made up of **1 or more** sessions on the same day.)

To find out more, please contact our Community Programmes Manager **Kate**

# Workshop Guide

## General Financial Wellbeing Sessions

**The Fundamentals of Financial Wellbeing (2-hours)** – our flagship session and a great way to start the Financial Wellbeing journey. The Workshop covers topics such as: financial resilience and the cost of living crisis, budgeting and keeping track, credit, borrowing and debt, savings and investments, making your money go further and how to access free, credible support.

**Financial Wellbeing Condensed (1.5- or 1-hour)** – condensed versions of the above; ideal for virtual workshops or when less time is available.

**Financial Wellbeing for Young Adults** – an in-depth, tailored session with a focus on the financial issues facing young adults who may be living independently. Suitable for ages 18-25.

**Women & Money** – a version of the above sessions, tailored specifically for women and the financial issues they face.

## Money Mentoring Programme

**An Introduction to Money Mentoring (4 sessions x 3-hours)** – this four-part programme is suitable for groups of up to 20 keen to learn more about supporting others in their community with managing their finances. Money Mentoring is a skilled practice which involves understanding the boundary between financial guidance and advice; being able to have good conversations about money plus understanding how and where to refer people.

This programme is not available fully-funded, but can be booked for the discounted rate of **£3,500 + VAT (virtual)** or **£4,000 + VAT (face-to-face)**, please contact us to discuss further.

## Spotlight & Thematic Sessions

**Eight separate sessions that complement our General Financial Wellbeing Sessions, covering a range of specific topics, pick the ones that suit you best:**

- Budgeting & Keeping Track
- Credit, Borrowing & Debt
- Savings & Investments
- Pensions
- Wills & Future Planning
- Financial Resilience & the Psychology of Money
- Mind Your Money (the links between money and mental health)
- Money Safety (covering identity theft, fraud & financial abuse)

## Refugee Programme

**Five separate 2-hour modules specifically designed to support refugees and asylum seekers. The sessions can be stand-alone, or organisations may wish to book the whole series:**

- Introduction to the UK Financial System & Banking
- Budgeting & Saving
- Credit & Debt
- Energy
- Safe Money

(Interpretation Services and their associated costs are the responsibility of the organisation booking the Workshop.)



# Financial Wellbeing Consultancy

Are you looking for expert help with any aspects of your **Financial Wellbeing** offer (such as employee, practitioner or volunteer training; content development for hubs, apps, e-learning; reviewing existing resources) or are you seeking a 'critical friend' for your project?

The Money Charity has extensive experience providing bespoke Consultancy to many well-known organisations from a wide range of sectors.

## The Seafarers' Charity

The Seafarers' Charity found that many fishers in the UK lacked a financial safety net, leaving them and their families financially vulnerable. They therefore approached us with a view to developing a new, mandatory Financial Wellbeing training module tailor-made for UK fishers.

Using our creative expertise in developing relatable content and activities, we produced Financial Wellbeing material specifically tailored to the challenges of fishers.

Tina Barnes, Head of Impact at The Seafarers' Charity said: "The Money Charity are experts on Financial Capability and have delivered a bespoke training course which will be delivered by Seafish as part of their 3-week 'Introduction to Commercial Fishing' training for new entrants. The Financial Champions webinar uses the training course as a basis for sharing information more broadly amongst peers and allies in UK fishing communities. The approach recognises that informal peer-to-peer learning from trusted individuals can be extremely valuable for those who aren't attracted by formal classroom-based learning. I am very grateful for The Money Charity's work on supporting Financial Capability in fishing communities and cannot recommend you more highly!"

## Southern Housing Group Many Sisters Project

We worked with Southern Housing Group to develop and deliver an Introduction to Money Mentoring course for their Many Sisters project female residents and volunteers.

Our years of experience in delivering Financial Wellbeing training to diverse groups means we are ideally placed to both develop engaging and impactful sessions, as well as equipping others with the skills, knowledge and training they need to take these messages out further into their own communities.

Their team said: "May we also take this opportunity to thank The Money Charity team for contributing to the success of the Many Sisters project, by helping us with our Workshops and now part of the Many Sisters Project legacy, the Money Mentors Champions Workshop. On behalf of the Project Team, it was a pleasure working with The Money Charity."



To find out more or discuss working with us on your project or product, please contact our Community Programmes Manager [Kate](#)