Financial Wellbeing Workshops & Webinars

For 30 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 and Webinars at a wide range of employers. We work with businesses of all sizes across diverse sectors, providing their employees with Financial Wellbeing guidance and training. With **52% of UK workers reporting that financial pressures impact their performance at work**, and **1 in 5 working-age adults in poverty**, there are clearly not only welfare, but sound business reasons for providing Financial Wellbeing support. [Source: LCP, 2024 & JRF, 2024]

Feedback from Attendees:

> "I appreciated someone impartial giving me guidance and pointing me in the right direction to help myself. Very helpful."

> "I really want to recommend this to numerous people in my life, as I can completely see how the relationship between wellbeing and emotions goes on to impact financial security"

> "Presenter made it clear, comfortable and engaging. Made talking about a difficult subject easier. Improved my knowledge and learnt new things."

Workshops & Webinars Available

We can deliver sessions virtually or face-to-face in many regions across the UK!

For virtual sessions, access the recording for up to 2 weeks free-of-charge!

General Financial Wellbeing Sessions

The Fundamentals of Financial Wellbeing (1.5-hours) – our flagship session and a great place for an employer to start the Financial Wellbeing journey. The session 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-hour) – a popular, condensed version of the above; ideal for lunchtime learning training formats.

Financial Wellbeing Extended (2-hours) – an extended version of the above; ideal for smaller groups with additional time for discussion, interactivity and questions.

Women & Money (1-hour) – a version of the above sessions tailored specifically for women and the financial issues they face.

Financial Wellbeing for Early Careers (1-2 hours) – versions of the above sessions, with a focus on the financial issues facing young adults (18-25) who may be new to the workplace including young apprentices. Focuses on how to budget on an starter/apprentice wage, housing costs, accessing discounts and financial support plus tips to make your money go further.

Money Mentoring Programmes

An Introduction to Money Mentoring (4 sessions x 3-hours) – these Programmes are for those keen to learn more about supporting others with managing their finances, be they in a customer-facing role or via peer support. 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.

Spotlight Sessions

These seven separate 1 hour stand-alone sessions complement our General Financial Wellbeing sessions, covering a range of specific topics:

- Budgeting & Keeping Track
- Credit & Borrowing
- Savings & Investing
- Pensions **(see below)**
- Wills & Future Planning
- Our Relationship With Money (including money and mental health)
- Money Safety (covering identity theft, fraud & financial abuse)

Tailored Pensions Sessions

Retirement & Pensions in Your Workplace (2-hours) – this in-depth, tailored session enables employees to think about the life they would like in retirement and how much money they may need to realise their goals. It helps make sense of topics such as auto-enrolment, pension consolidation, managing pension contributions and budgeting to maximise their pension.

We will work with you in advance to incorporate information on your workplace pension scheme(s) into the session.

Pricing

We offer a 10% discount if booking 3 or more sessions, and a 10% discount for charities

All prices are exclusive of VAT

Theme	Session	Duration	Face-to-Face Workshop Price (up to 20 attendees) OR Webinar Price (up to 300 attendees)	Virtual Workshop Price (up to 20 attendees)
General Financial Wellbeing Sessions	The Fundamentals of Financial Wellbeing *condensed*	1 hour	£700	£600
	The Fundamentals of Financial Wellbeing (our Flagship session!)	**1.5 hours**	**£850**	**£750**
	The Fundamentals of Financial Wellbeing *extended*	2 hours	£1000	£900
	An Early Careers version of all of the above sessions is also available, for employees new to the workplace			
	Women & Money	1 hour	£700	£600
Spotlight Sessions	Budgeting & Keeping Track			
	Credit & Borrowing			
	Savings & Investing			
	Wills & Future Planning			
	Our Relationship with Money			
	Money Safety			
Tailored Pensions Sessions	Retirement & Pensions in Your Workplace	2 hours	£1000	£900
Money Mentoring Programmes	Money Mentoring in Customer Facing Roles, For Employees, or in a Place of Study	4 x 3 hours	£5,000	£4,500

All revenue generated from our charged-for sessions supports the wider charity's operations and allows us to deliver free sessions to thousands of young people and vulnerable communities a year.

To find out more please contact **lewis@themoneycharity.org.uk**

the MONEY Charity

The Impact of Our Sessions

In 2024...

we partnered with 80 employers delivering over 200 sessions reaching over 5,300 employees

Following our sessions, attendees consistently:

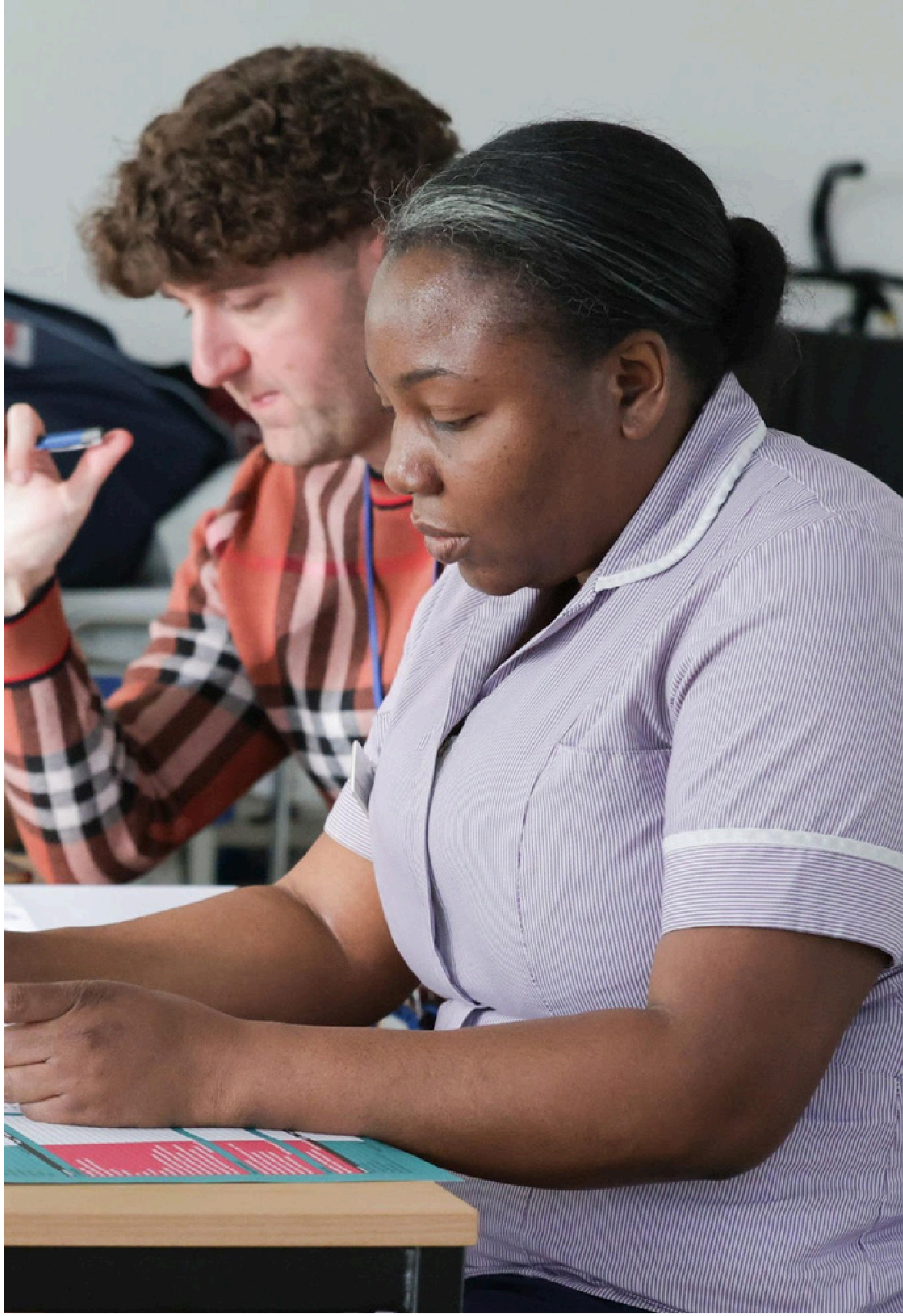
- have greater confidence in managing money
- talk to others more about money
- feel more financially capable and able to plan for the future
- have increased awareness of financial tools and information
- reporting having fewer money worries

Rating the session out of 5

63%	★★★★★
27%	★★★★
7%	★★★
2%	★★
1%	★

95%

of attendees would recommend us to others!



To find out more please contact lewis@themoneycharity.org.uk

the MONEY charity

Recent Employer Case Studies

Are you looking for some inspiration for your Financial Wellbeing activities as an employer? The Money Charity has extensive experience providing sessions across a wider range of sectors and sizes of employers.

Check out these case studies where The Money Charity worked with employers to deliver a series of sessions to meet their employers' needs and interests, as part of their wider Financial Wellbeing efforts.

Large Drinks Manufacturer

Approached The Money Charity due to our diverse delivery experience and face-to-face model. The target audience was mainly early careers employees who work within manufacturing, not in office based roles, so on-site workshops were run to maximise impact for this groups as well as online webinars/resources.

The Money Charity delivered a series of face-to-face workshops focusing on the important of budgeting, being smart with housing costs, fully understanding payslips, spotting scams, and where to find support if experiencing unmanageable debt (a growing trend in young adults across the UK).

Attendees commented on how these sessions were delivered in both an "informative" and "engaging" manner, particularly appreciating the group activities incorporated within them.

Civil Engineering Company

Over a number of years The Money Charity has delivered sessions to employees of this civil engineering company, with a focus on improving knowledge and awareness around pensions and helping employees prepare for their financial futures.

Through collaboration with this employer we have incorporated information on their workplace pension into our sessions, providing employees with a full overview of their pensions and options.

This has opened up conversations about money leading to a more holistic programme of workshops being scheduled to broaden the support and learning for colleagues aorund money.

We have years of experience in the following sectors, and more:

Hospitality | Construction | Financial Services | Healthcare | Education | Local Authorities | Charities | Transport

To find out more please contact **lewis@themoneycharity.org.uk**

the MONEY Charity