The MONEY Charity

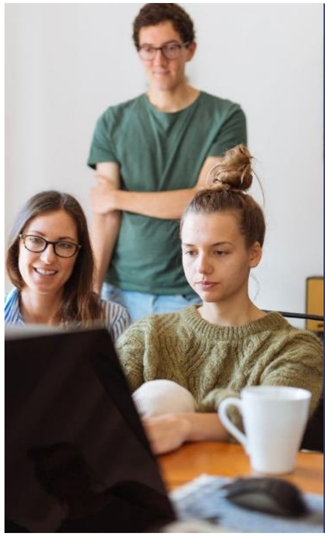
Financial Wellbeing Workshops & Webinars

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 and Webinars to a wide range of organisations. We work with businesses of all sizes across diverse sectors, providing their employees with Financial Wellbeing advice and training. With **94% of UK employees admitting to worrying about money and 77% of these saying that money worries impact them at work***, there are clearly not only welfare, but sound business reasons for providing Financial Wellbeing training. *Close Brothers Financial Wellbeing Index 2019

Workshop & Webinar 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."

B&Q
southend on sea Borough Council
Building Societies Association
Clarion
Taylor Wimpey
Grand Central by arriva
OpenSignal
UNISON the public service union
Haier Europe
thriving workplaces
Beiersdorf
ual: university of the arts london
HSS Hire
nest
Southern Housing Group
ABI
catalyst
Usborne
AA

Workshops & Webinars Guide

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 Young Adults OR Young Apprentices (1-2 hours) – versions of the above sessions, with a focus on the financial issues facing young adults who may be new to the workplace (suitable for ages 18-25) OR young apprentices (focusing on how to budget on an apprentice wage, including 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 & 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 **(see below)**
- 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)

Life After Work Sessions

Pensions (1-hour) – this session covers the basics of pensions; how to assess your current situation and how to go about seeking financial advice; ideal for lunchtime learning training formats.

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.

Workshops & Webinars Guide

All prices are exclusive of VAT.

Theme	Session	Duration (Mins)	Virtual Workshop Price	Face-to-Face Workshop Price (up to 20 attendees)	Webinar Price (21-300 attendees)
General Financial Wellbeing Sessions	1-hour Financial Wellbeing condensed	**60**	**£550**	**£650**	**£700**
	1.5-hour Financial Wellbeing Fundamentals	**90**	**£700**	**£800**	**£850**
	2-hour Financial Wellbeing extended	**120**	**£850**	**£950**	**n/a**
	Women & Money	**60**	**£550**	**£650**	**£700**
	Financial Wellbeing for Young Adults OR Young Apprentices	**60-120**	**£550-850**	**£650-950**	**£700-850**
Spotlight & Thematic Sessions	Budgeting & Keeping Track	**60**	**£550**	**£650**	**£700**
	Credit, Borrowing & Debt				
	Savings & Investments				
	Wills & Future Planning				
	Financial Resilience & the Psychology of Money				
	Mind Your Money				
	Money Safety				
Life After Work Sessions	Pensions	**60**	**£550**	**£650**	**£700**
	Retirement & Pensions in Your Workplace	**120**	**£850**	**£950**	**n/a**
Money Mentoring Programmes	Money Mentoring in Customer Facing Roles	**4 x 180**	**£4,000**	**£4,500**	**n/a**
	Money Mentoring in Your Workplace or Place of Study				**n/a**

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.)

Sessions Bundle

Book any 3 sessions for a **10%** discount.

To find out more, please contact our Workplace Financial Wellbeing Team: **adults@themoneycharity.org.uk**

The MONEY Charity

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.

Building Societies Association (BSA)

We developed a set of resources for BSA members to use, in order to develop the Financial Capability of groups of adults in their communities, both virtually and in-person.

These Understanding Money resources covered: better budgeting, borrowing and debt, money safety as well as saving for success.

Building societies and credit unions are trusted institutions based in diverse communities across the UK and are therefore well placed to help support people’s understanding of money and increase their Financial Wellbeing. We were delighted to work with the BSA in developing these resources, to give their members a strong basis for this vital work."

Professional Association for Childcare and Early Years (PACEY)

We worked with PACEY to develop two e-learning courses for early years practitioners, one on how they manage their money to increase their Financial Wellbeing, with another on how they can teach and engage children with Financial Education.

Using our expertise in Financial Wellbeing and Education, we wrote and designed the content of these courses. Key to this was considering both the personal needs of practitioners and what they needed to know in order to deliver Financial Education to the children they support, as well as how they support parents to engage their children in money management topics.

Our experience helps us collaborate with organisations to develop the high-quality, tailored content they need, drawing together our unique expertise across helping people of all ages with their Financial Wellbeing and Financial Education.

To find out more or discuss working with us on your project or product, please contact our Team: adults@themoneycharity.org.uk