

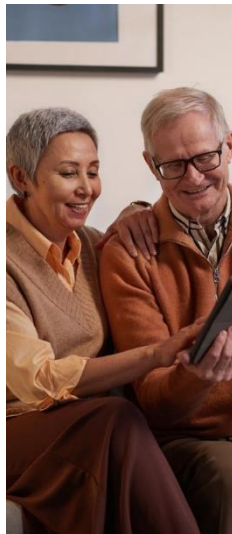


# Financial Wellbeing Workshops & Webinars

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 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

## 2021 Workshop & Webinar attendees:



“  
Very clearly given information and advice on how to look after our money. Good recommendation of useful websites and things I wasn't aware of...also, great push on help that is available for anyone that struggles with money.  
”



“  
I found this course excellent and the trainer was BRILLIANT! ...so efficient and gifted at delivering information and very knowledgeable. I would highly recommend it. I gave it a 10.  
”



“  
I found the workshop useful, especially in terms of feeling in control of my financial future. even in the event of debt.  
”



# Workshops Guide

## General Financial Wellbeing

**Financial Wellbeing (2-hours)** – a great way for an employer to start the financial wellbeing journey. The workshop covers topics such as: financial resilience, budgeting and keeping track, credit, borrowing and debt, savings and investments, making your money go further and how to access free, credible support.

**Lunch & Learn Financial Wellbeing (1-hour)** – a popular, condensed version of the above; ideal for lunchtime learning training formats.

**International Lunch & Learn Financial Wellbeing (1-hour)** – an international version of the above Financial Wellbeing session; ideal for multinationals.

**Financial Wellbeing for Young Adults (1.5 hours)** – a tailored session with a focus on the financial issues facing young adults. Suitable for ages 18-25.

**Women & Money (1-hour)** – a session tailored specifically for women and the financial issues they face.

## Everyday Money

**A series of 1-hour sessions covering a range of specific topics:**

- Budgeting & Keeping Track
- Credit, Borrowing and the importance of credit scores
- Debt
- Financial Resilience & the Psychology of Money
- Savings & Investments
- Money Safety (identity theft, fraud & financial abuse)
- Wills & Future Planning

## Your Money & Covid

**Your Money During Challenging Times (1-hour)** – designed to help people reassess their financial situation in light of the pandemic. Tips will be shared on budgeting, how to make your money work harder and save on everyday expenditure, plus where to go for further information and support.

**Redundancy & Your Money (1-hour)** – redundancy may be a shock, or it may be planned, but whatever the circumstances, there are important decisions to be made. This workshop will cover the questions people need to ask themselves before making these decisions and will look at the different options. Details of organisations offering support will also be shared.

**Mind Your Money (1-hour)** – this workshop explores the importance of building financial resilience and the link between money and mental wellbeing. It also encourages people to think about their relationship with money and how, if necessary, they can begin to challenge this.

## Life After Work

**Retirement & Pensions (3-hours)** – this in-depth, tailored workshop 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. During the session, attendees will have the opportunity to log on to their company and state pension accounts. We will work with you in advance of the workshop to incorporate information on your pension scheme(s) into the workshop.

**Lunch & Learn Pensions (1-hour)** – this session covers the basics of pensions; how to assess your current situation and how to go about seeking financial advice.

# Workshops Guide

Theme	Workshop*/Webinar	Duration (mins)	Workshop Price (up to 20 attendees)	Webinar Price (100-300 attendees)
General Financial Wellbeing	2-hour Financial Wellbeing	120	£600	£850 - £1,000
	Lunch & Learn Financial Wellbeing	60	£350	£550 - £800
	International Lunch & Learn Financial Wellbeing	60	£350	£550 - £800
	Financial Wellbeing for Young Adults	90	£500	£650 - £850
	Women & Money	60	£350	£550 - £800
Your Money & Covid	Your Money During Challenging Times	60	£350	£550 - £800
	Redundancy & Your Money			
	Mind Your Money			
Everyday Money	Budgeting & Keeping Track	60	£350	£550 - £800
	Credit & Borrowing			
	Debt			
	Financial Resilience & the Psychology of Money			
	Savings & Investments			
	Money Safety			
	Wills & Future Planning			
Life After Work	Retirement & Pensions (full workshop)	180	£800	N/A
	Lunch & Learn Pensions	60	£350	£550 - £800

## All prices are exclusive of VAT

\*All of our workshops are available as virtual sessions (delivered via Zoom, or your organisation's platform.) For advice on specific programmes and bespoke training solutions, The Money Charity offers a Consultancy service for organisations looking for advice and/or a tailor-made solution.

We also work with Young People in schools, colleges and community settings.

To find out more, please contact our Training Officer [Emma](#)