Workplace Financial Wellbeing Workshops, Webinars & Programmes

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]

What We Offer

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, 1.5, 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. Covers how to budget on an starter/apprentice wage, housing costs, accessing discounts and financial support plus moneysaving tips.

Spotlight Sessions

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

- Budgeting & Keeping Track
- Credit & Borrowing
- Savings & Investments
- Pensions (see also below)
- Wills & Future Planning
- Our Relationship with Money
- Money Safety

Money Mentoring Programmes

For Customer Facing Staff OR Money Mentoring for Colleagues - 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.

4 x 3-hour Workshops (available virtually or face-to-face)
Suitable for up to 20 people

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.

Suitable for workplaces with up to 2 DC Pension Schemes

Pricing

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

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.

THE **MONEY** CHARITY

Theme	Session	Duration	Face-to-Face Workshop price* (groups up to 20)**	Webinar Price (groups up to 100)**
Introductory Financial Wellbeing Sessions	The Fundamentals of Financial Wellbeing (condensed)	1 hour	£900	£750
	The Fundamentals of Financial Wellbeing (our Flagship session!)	1.5 hours	£1,050	£900
	The Fundamentals of Financial Wellbeing (extended)	2 hours	£1,200	£1,050
	An Early Careers version of all of the above sessions is also available, for employees new to the workplace			
	Women & Money	1.5 hours	£1,050	£900
Spotlight Sessions	Budgeting & Keeping Track	1 hour	£900	£750
	Credit & Borrowing			
	Savings & Investing			
	Pensions			
	Wills & Future Planning			
	Our Relationship with Money			
	Money Safety			
Tailored Sessions	Pensions & Retirement in Your Workplace	2 hours	£1,200	£1,050
Money Mentoring Programmes	Money Mentoring in Customer Facing Roles, For Employees, or in a Place of Study	4 x 3 hours	£5,400	£4,900

All prices are exclusive of VAT
*discounts available if multiple bookings on same day; additional travel or accommodation costs may apply
**large group surcharge £100 per workshop (over 20 for face-to-face, or over 100 for virtual)

The Impact of Our Sessions

> 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.

In the past 3 years we've...

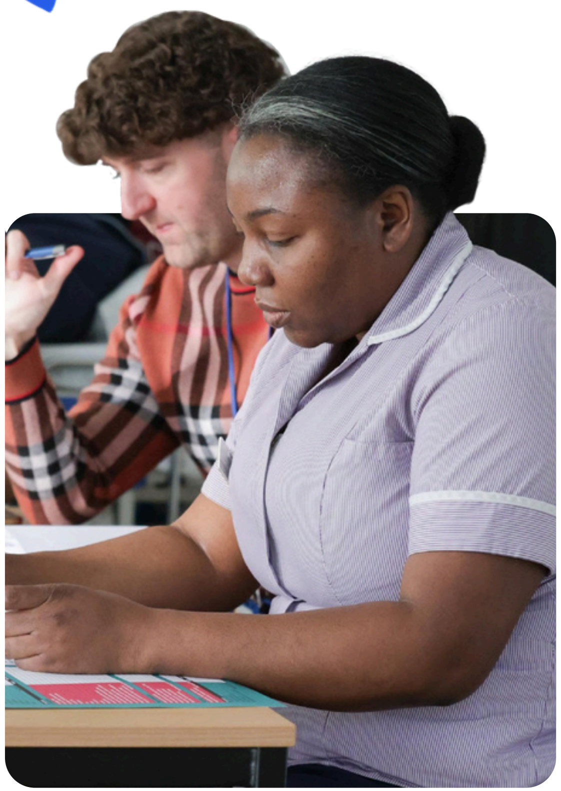
- Partnered with 300 employers
- Delivered over 500 sessions
- Reached over 15,000 employees

95%

of attendees would recommend us to others!

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
- report having fewer money worries



To find out more, please contact **rhi.jones@themoneycharity.org.uk**

Recent Employer Case Studies

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 around money.

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

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

To find out more, please contact **rhi.jones@themoneycharity.org.uk**