Financial Wellbeing Fellowship

THE MONEY CHARITY

Financial Wellbeing Fellowship

CAPITAL GROUP®

Table of Contents

1 About Capital Group & The Money Charity

2 Financial Wellbeing Fellowship Vision

3 Financial Wellbeing Fellowship Overview

4 Curriculum Overview

5 Questions

About Capital Group

Founded in Los Angeles in 1931, Capital Group is one of the world's largest independent investment managers and home to the American Funds mutual fund family. Capital Group has helped generations achieve important financial goals, such as saving for retirement, building a business, and funding an education.

Committed to the well-being of clients, associates, and the communities where we live and work, Capital Group remains focused on our mission to improve people's lives through successful investing.

In 2023, Capital Group launched its Social Impact program, which aims to reduce the barriers to investing for individuals in underserved communities, increasing access to the transformational benefits of wealth. The Social Impact program is community-led, built on the belief that empowering underserved communities is most successful when based on understanding their unique needs.

Capital Group's Social Impact program laid the groundwork for the Community Wealth Council (CWC)—a collaborative global initiative that channels the firm's investing legacy into community-led solutions that expand access to wealth-building opportunities.

In the United Kingdom, this work is known as the Financial Wellbeing Fellowship (FWF)—a localised expression of CWC's mission, focused on advancing financial resilience and equity through cohort-based learning and community-rooted partnerships.

About The Money Charity

For over 30 years, The Money Charity has been the UK's Financial Capability charity.

Our Purpose - We empower people across the UK to build the skills, knowledge, attitudes and behaviours, to make the most of their money throughout their lives.

Our Vision - Everyone achieves Financial Wellbeing by managing their money well.

Our Work - We deliver workshops to people of all ages in schools, colleges, universities, workplaces and community settings across the UK. We provide consultancy to a diverse range of commercial and third sector clients.

We campaign, contribute to policy consultations and work with the financial services industry to encourage developments that make money easier to understand and manage.

Financial Wellbeing Fellowship Vision

The Financial Wellbeing Fellowship is dedicated to empowering charities in the UK and their staff to strengthen and/or build Financial Capability, Education & Wellbeing support, for the benefit of the community members they serve. It recognises the pivotal role charities play within our communities and seeks to create a council of Financial Wellbeing Changemaker Charities.

Our programme also aims to create a network of Fellows, enhance their skills in providing guidance, support them to embed their learnings in the wider work of their organisations, and provide counsel to other Fellows to build a community of practice.

Together, we can transform Financial Capability into actionable strategies for the Financial Wellbeing Changemaker Charities in the UK to uplift and empower our most vulnerable community members, helping people to gain the confidence, skills and knowledge needed to improve their Financial Wellbeing.

The Fellowship equips the Fellows with the necessary skills to enhance the Financial Capability offer in their organisations by:

- Inspiring Fellows to be catalysts for healthier mindsets towards money; helping their communities see effective money management as a source of empowerment, rather than something to be feared or avoided.
- Equipping Fellows with knowledge and tools both to improve their own Financial Wellbeing, and to guide their community members towards Financial Wellbeing.
- Empowering Fellows to direct their organisations in the development of effective Financial Capability programmes.
- Helping Fellows establish strong networks of peers and financial professionals who can provide tailored and ongoing support for their organisation's Financial Capability efforts.

Financial Wellbeing Fellowship

Overview

The Financial Wellbeing Fellowship is dedicated to building capacity and expertise within charities in the UK, to enable them to improve the Financial Wellbeing of the community members they support. Investing in the professional development of the Fellows, the programme is not just an educational opportunity; together we will create a network of Financial Wellbeing Changemaker Charities to share best practice and ensure the sustainability of our work to improve Financial Wellbeing in the UK.

The program offers four key elements to fellows, as outlined below.

TRAINING

The programme will feature a curriculum applicable to the Fellows' work developing their own financial capability programs - this will include not only the basics of personal finance but also training on how to support others with money management. The topics covered will strengthen Fellows' financial understanding as well as their ability to develop Financial Wellbeing offers that respond to the needs of their communities.

STRATEGIC SUPPORT

Following the training, The Money Charity will work with Fellows to design and provide a bespoke package of follow-on strategic support to embed learning within the Financial Wellbeing Changemaker Charities, and either develop new offers of Financial Wellbeing support for their community members or enhance exisiting offers.

FUNDING

Each Financial Wellbeing Changemaker Charity will have access to a small pot of funding to facilitate the development or enhance their existing Financial Wellbeing offer.

ALUMNI NETWORK

All Fellows, and the organisations they represent, will be invited to join a network of Financial Wellbeing Changemaker Charities to share learnings and best practice and join our efforts to improve the Financial Wellbeing of communities in the UK.

Curriculum Overview

The curriculum will be adapted to meet the specific needs of each cohort of Fellows and the communities they support, therefore the below is subject to changes.

1 Starting the Fellowship Journey
Topics may include: Defining Financial Wellbeing, Our Relationship with Money, Having Conversations about Money, and Advice vs Guidance.

2 Financial Wellbeing Fundamentals
Topics may include: Budgeting & Priority Bills, Boosting Income & Cutting Costs, Saving and Financial Abuse.

3 Helping People Make Informed Decisions
Topics may include: Credit & Credit Scores, Supporting People with Debt Problems, Scams and Money Safety

4 Financial Wellbeing Fellowship Projects
Topics include: Designing your Fellowship Project, Support Package Options, Alumni Network & Next Steps.

How You Will Participate

Training Programme
The training programme is a total of 12 hours long. While each training session is 3 hours long, Fellows will attend a launch and a closing event alongside sessions 1 & 4 in London. Session 2 and 3 are delivered online. Attendance at all 4 sessions is required to ensure you receive comprehensive guidance and support.

Strategic Support
Following the training programme, there will be follow-up calls with Fellows to determine what support their charities need to implement or enhance their Financial Wellbeing offer.

Alumni Network
All Fellows will join the the Financial Wellbeing Fellowship Network (hosted virtually using LinkedIn) to share learnings and resources, and access follow-up training opportunities.
In addition, there will be at least one in-person network event per year.
Full participation in all of the above is necessary to take part in the Fellowship.

Application Process & Key Dates

The next cohort of Fellows will start their training programme in-person in London on the 2nd February 2027, 9:30-16:00. Sessions 2 and 3 will be online on Wednesday 24th February and 10th March, 9:30-12:30. The closing day of the training programme will be in-person in London on Wednesday 24th March 2027, 9:30-16:00. Travel expenses will be covered.

Applications for this cohort will open in October 2026. The application process consists of an introductory virtual meeting and a simple application form.

Fellowship Journey

1.

Training Programme
February to March 2027

2.

Fellowship Project Planning Meetings
April 2027

3.

Consultancy Support & Alumni Network
April - June 2027

4.

Design & Delivery of Fellowship Project & TMC Workshop Delivery
April - October 2027

5.

Impact Reports
October 2027

THE MONEY CHARITY

Questions?

If you have any questions, would like to discuss this opportunity further and/or apply, please contact Kate McQueen at kate@themoneycharity.org.uk

Together, we can transform Financial Capability into actionable strategies for the Financial Wellbeing Changemaker Charities in the UK to uplift and empower our most vulnerable community members, helping people to gain the confidence, skills and knowledge needed to improve their Financial Wellbeing.