

Employee Benefits Live 2025



FINANCIAL EDUCATION

Financial Wellbeing at Work: Supporting the Moments that Matter

WITH

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Agenda

- ✓ Context
- ✓ Identifying The Need
- ✓ The Approach & Content Plan
- ✓ Emerging Results
- ✓ Looking Ahead
- ✓ Summary



Introduction & Context

- ✓ All wellbeing pillars
- ✓ Financial Stress
- ✓ Gaps
 - ✓ Education
 - ✓ Advice
 - ✓ Products/Services

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Identifying The Need

- ✓ Surveys & Focus Groups
- ✓ Identifying groups and needs

The Approach & Content Plan

- ✓ Tailored Education
- ✓ One to One guidance / advice
- ✓ Manager's training

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Emerging Results

- ✓ High Engagement
- ✓ Positive feedback



Looking Ahead

- ✓ Integrating holistic wellbeing
- ✓ Scaling and sustaining impact



Summary

- ✓ Financial Resilience
- ✓ Engagement and Change
- ✓ Scaling and maintain the impact

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Questions?





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