

# The Financial Wellbeing Masterclass

## The agenda



We are on a mission to share everything we know and have learnt about financial wellbeing in the ultimate Financial Wellbeing Masterclass. Across four two hour lessons we will provide HR professionals with the skills and expertise they need to implement financial wellbeing into their business, straight away.

### Our speakers



#### Darren Laverty

Darren has almost 30 years' experience working in the financial services and employee benefits industries. He is passionate about financial education and communication, and making a difference to the financial lives of the people he meets. Darren is also a highly accomplished public speaker and a leading financial education, pension and benefits commentator.



#### Matthew Mitten

Matthew has over 20 years' experience working in financial services. Matthew is passionate about how we communicate in the workplace, using all the tools available to deliver multi-channel communications to engage with as wide an audience as possible. His expertise in the employee benefits and pensions arena is extensive.



#### Ian Bird

With over 25 years' experience in financial services and employee benefits, Ian understands the needs of the clients he works with. Ian specialises in workplace savings schemes, including group pensions, corporate ISAs, share plans, group risk and financial education.



## Syllabus and timetable

### **Wednesday 22<sup>nd</sup> June, 9am – 11am**

#### **Lesson 1 - The official definition of financial wellbeing:**

- The 4 key pillars of financial wellbeing
- The 80/20 rule
- Managing financial stress
- Improving financial resilience instantly

#### **Lesson 2 - Measuring financial wellbeing:**

- The financial wellbeing assessment and score
  - Strategically identifying where the highest level of financial stress sits in your organisation
  - The employee personal report and recommended action plan
  - Corporate analysis and benchmarking
  - Identifying employee needs to help create your unique strategy
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### **Thursday 23<sup>rd</sup> June, 9am – 11am**

#### **Lesson 3 - The 5 most dangerous trends employers need to know to improve financial wellbeing:**

- Avoid the most common mistake made by most organisations
- Why 80% of interventions are a waste of time
- Maximise the effectiveness of any time and money invested in financial wellbeing
- A supplier business model that makes matters worse and not better
- A little known secret guaranteed to increase employees savings rates

#### **Lesson 4 - Identifying what matters the most to your employees:**

- Raising financial savvy to help employees know what matters the most to them
  - Segmentation or self-selection
  - Online versus face to face
  - Prioritising the most popular areas
  - The importance of good comms when educating on employee benefits
  - How great employee benefits communication can support financial wellbeing
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## Tuesday 28<sup>th</sup> June, 9am – 11am

### Lesson 5 - How to review your employee benefits strategy from a financial wellbeing perspective:

- The employee benefits that should improve financial wellbeing but don't and why they don't
- A case study of an employee benefits review
- Specific aspects of group pensions that indicate the level of financial wellbeing
- How to maximise the value of salary sacrifice

### Lesson 6 - Transforming your employee benefits package into a financial wellbeing strategy

- The evolution of workplace savings
  - Introducing psychology to your employee benefits communication
  - Why traditional financial education is not working
  - Maximising engagement with existing employee benefits
  - Maximising ROI of employee benefits to improve retention
  - Ensuring total reward supports retention and financial wellbeing
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## Wednesday 29<sup>th</sup> June, 9am – 11am

### Lesson 7 - 6 quick wins to support employees through the cost of living:

- The most important aspect of financial wellbeing that is ignored by the financial services industry
- How to increase take home pay with no loss to employees at cost to employers
- Motivating employees to take control by budgeting
- 10 killer questions to get the best from your pension provider
- Re-energising salary sacrifice
- The financial wellbeing score

### Lesson 8 - How to create your bespoke strategy designed for your unique workforce:

- Review employee needs
- Review employee wants
- Evolve financial employee benefits
- Which 3rd party suppliers to select and why
- Getting your priorities right

### Lesson 9 - Building the business case:

- The current UK climate
- Company specific analysis and findings
- The costs, benefits and risks of action and inaction
- The proposed strategy
- Timeline and operational impact

**There will be multiple complimentary resources and tools available at the end of the Masterclass.**

Not registered yet? Find out more and register [here](#).