

# Financial wellbeing forum

How to find out what matters the most to  
your employees



# Financial wellbeing

When employees are financially stressed, it can have serious impact on their mental health and overall wellbeing. It can also have a significant impact to your business with many employees taking time off sick, suffering with low moral or decreased productivity. So as an employer, it makes sense for you to support your employees where you can with their financial wellbeing.

## Creating the right strategy

With limited time and budgets, it is important to ensure that when you embark upon a workplace financial wellbeing strategy for your people, that you are effective and target the areas that matter the most to your employees.

However, all too often employees are unsure how to think about their finances, and often get their priorities wrong. To accurately find out what employees really want and what matters the most to them, we have developed a financial awareness forum.





# Our financial wellbeing forums

In our forums, you can invite a representative sample of employees to enjoy 45 minutes of fun and engaging financial content. Presentations are delivered with passion, and in the Secondsight style, to help raise awareness so that by the end of the forum employees know exactly what areas are the most important to them.

Delivered either in person or live online, every financial topic is covered off at a high level, giving meaning and context to their own personal situation. During the session, we obtain feedback and ask the attendees to vote for which areas of finance are most important to them, and which areas they would like to learn about the most. And, by giving employees the opportunity to self select topics which are most important to them, it increases attendance as well as helps improve engagement.



We offer two high level financial forums designed to help employees gain a better understanding of all the topics on offer.



### Make your money count

This forum offers bite sized information on some of the most popular financial planning areas affecting us all. It is slightly weighted to more technical financial subjects and is suited to a more mature audience.

The areas covered are:

- our responsibility to young people and their biggest challenges;
- why recent growth in family wealth must be acknowledged and preserved;
- why we need to completely rethink retirement planning;
- how to see your own financial future mapped out;
- how to avoid over paying tax; and
- how to increase your investor confidence.



### How to immediately improve your financial wellbeing

Aimed at a younger audience, this forum is more weighted towards the psychology behind financial wellbeing and is there to motivate people to change their habits and behaviours. In addition to covering popular financial planning areas, this session will get your employees thinking about the changes they could be making to improve their financial wellbeing. It will also signpost them to follow-on tutorials and presentations on topics they may wish to learn more about.

The areas covered are:

- understanding the 4 key pillars of financial wellbeing;
- practical steps you can take right now to improve financial wellbeing;
- how to take control and reduce financial stress
- how to overcome procrastination and get motivated; and
- boosting your investing confidence.

# About our presentations

Our content is high impact and full of imagery, with limited use of on screen words and bullets. Our forums are designed to engage employees, leaving them feeling motivated to start thinking about their next steps. You should see quite a change in mindset of the attendees after the session.

## What's in it for employers

As an employer, this method helps to remove all the guess work in your financial wellbeing strategy and saves you both time and money in the long run. This representative sample of employees will, in theory, provide you as an employer with the intel you need to shape your financial wellbeing strategy. All employee feedback and self selected financial topics will be brought together in a report for you. This is an important tool if you are to build a business case for financial wellbeing.





To find out more about our financial wellbeing forums, or any of our wellbeing presentations, contact us today on:

call 0330 332 7143\*;

email [info@second-sight.com](mailto:info@second-sight.com); or

visit [www.second-sight.com](http://www.second-sight.com)

\* Calls are charged at your standard landline rate.

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