



SG CORPORATE SERVICES  
Workplace Pensions and Employee Benefits

## AT A GLANCE

### CHALLENGES

Providing staff with information on Financial Wellbeing and Education

### BENEFITS

- Staff were provided with tools and an action plan to improve their Financial Wellbeing
- Our presentation had the highest attendance of all activities in the company that week
- Several employees contacted us afterwards seeking further information

### OUTCOME

By offering this support to their employees, the company will benefit from increased in staff motivation.

# CASE STUDY

## Financial Wellbeing – Financial Planning Support for Employees

### OVERVIEW

A large regional firm of solicitors were running a Wellbeing Week for their staff to ensure they were supporting employees.

Much of the content for the week was focused on physical and mental wellbeing – which was great. However, they also wanted to provide staff with further information and education on Financial Wellbeing, which is not something they had offered in the past.

### OBJECTIVES

- Provide a virtual presentation, via Microsoft Teams, to staff on:
  - What is Financial Wellbeing
  - Why budgeting is important
  - Methods on how to save
  - Managing debt
  - Financial tips
- The presentation was to be recorded and shared with staff who were unable to attend

### HOW WE HELPED

- Prior to the planned presentation, we created an online form via which staff could ask finance related questions anonymously. These questions were then addressed at the end of presentation
- Delivered a 20-minute presentation via Teams
- Gave staff the opportunity to ask questions after the presentation
- Provided the recording and our contact details for staff to follow up afterwards

## CONTACT US

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