

Financial

security is a key part of employee wellbeing, which we can support through

Education



Financial education



An integral part of any employee benefits package is ensuring staff have access to financial education – whatever stage they may be at in their lives. We recognise the need for guidance to sit alongside existing physical and mental wellbeing support. After all, it's often reported that for many adults, worrying about their finances is one of their biggest causes of stress.

Therefore, we have created a tailored and collaborative approach to educate all employees, be they in their early career – where we focus on budgeting, borrowing and savings – to those pre-retirement employees, where the discussion centres on health, income and pensions freedoms.*

With such a wide diversity of products and services available, many employees simply do not understand, or are unable to find out, what their options are and how best to manage their financial goals. With increasing freedom and choice comes the need for more financial information and education, so employees can make the right decisions.

The Government is keen to see a change in the ways we manage our money and financially provide for ourselves throughout our lifetimes (therefore reducing the burden on the state). Budget changes have had a dramatic effect on the promotion of employee benefits such as pensions. As a result, employees are now faced with complex and technical products and services whose true value they sometimes struggle to understand.

Throughout the education we provide, we use bespoke seminars, online and paper content that engages, educates and empowers the audience. There is also the option – should employees require or wish for it – to speak to one of our financial advisers on a one-to-one basis.

Get in touch

For more information, or to arrange a meeting to discuss your employee benefits strategy and employee communication options, please email us at info@mattioliwoods.com, or contact your Mattioli Woods consultant.

*Barclays Corporate and Employer Solutions (C&ES) - Financial wellbeing: the last taboo in the workplace?

Mattioli Woods plc is a leading provider of wealth management and employee benefit services. We pride ourselves in building long-term relationships to provide trusted advice, high standards, and a personalised delivery. We provide our clients with an all-embracing and integrated approach that is designed to develop a clear strategy for financial plans, supported by sound investment and taxation initiatives.

This document has been produced for information purposes. It is not intended to be an invitation to buy, or act upon the comments made, and all/any investment decisions should be taken with advice, given appropriate knowledge of the investor's circumstances. You must satisfy certain investor criteria before you can be considered eligible to invest. Any forward-looking statement and forecasted returns represent the current views of Mattioli Woods plc and may be subject to change. Your capital may be at risk and past performance is not a guide to future returns. Mattioli Woods plc is authorised and regulated by the Financial Conduct Authority.