

For employer use only

Workplace financial wellbeing employer toolkit

A guide and tools for employers



Pensions | Investments | Protection

Financial wellbeing and your employees

This toolkit helps support and communicate financial wellbeing to your employees

You may remember we partnered with the Centre for Economics and Business Research (CEBR) to try and quantify some of the issues associated with financial wellbeing. Most notably the average financial wellbeing score across the nation, a range of industries and also the impact that poor financial wellbeing has on productivity.

Two summary documents were produced for you as a useful resource when considering the challenges your employees could be facing:



Financial wellbeing in the workplace
A summary of the Aegon and Centre for Economics
and Business Research report

Our [summary report](#) includes research findings on the topic of financial wellbeing:

- People's control over their finances;
- their ability to respond to financial unpredictability and unexpected financial expense;
- their ability to meet financial goals, and
- make choices that allow them to enjoy life.

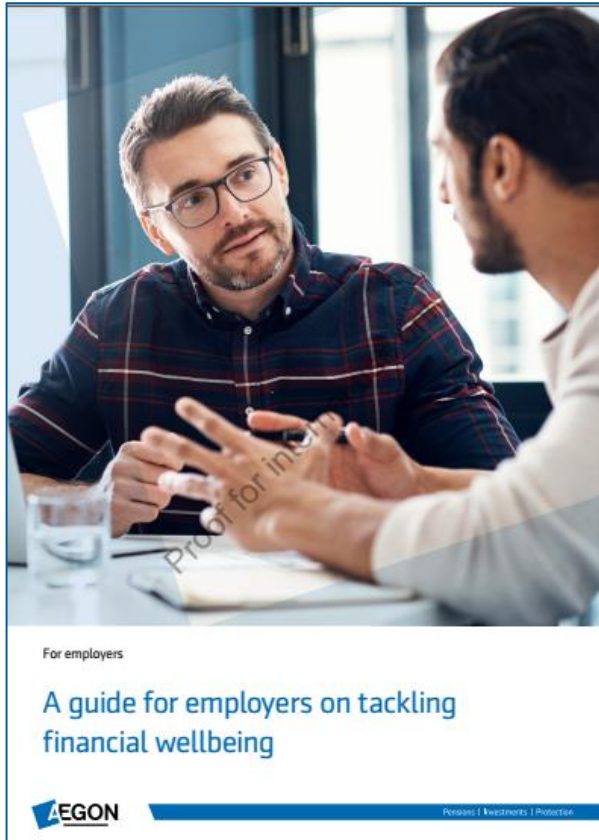


Financial wellbeing in the workplace
A summary of Aegon's research into employee views

We also produced a [summary of research](#) carried out by YouGov amongst employers exploring their views on financial wellbeing in the workplace.

Based on these findings we're now providing you with actionable insights on the ways in which you can support your employees to engage with their finances.

Our guide to help you communicate financial wellbeing to your employees



We've developed this guide, to help you support employees in relation to financial matters.

Where you might be unsure about how you should be supporting employees with their financial situation, this guide provides suggestions around the routes you can use to reach out and help alleviate financial worries, which in turn aims to improve your employees financial wellbeing.



[A guide for employers on tackling financial wellbeing](#)

Email and intranet content

Draft copy to help you create a financial wellbeing hub



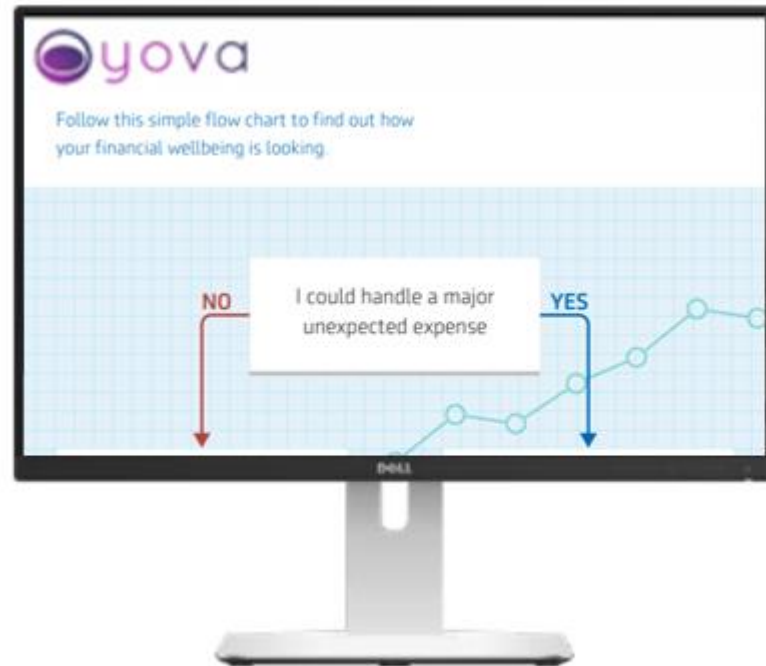
If your employees are never far from a screen, then our email and intranet content will give you the opportunity to create and promote a financial wellbeing content hub for them.



[Email and intranet copy](#)

Self assessment quiz

A tool to help employees check their financial wellbeing



Our simple quiz can help employees find out how their financial wellbeing is looking.

We've featured the quiz in the email and intranet content so it's really easy to share with your employees.



[Self assessment quiz](#)

Employee leaflet

Content to help employees understand their workplace pension



This leaflet contains information and recommendations on how your employees can get the most out of their workplace pension.

You could include this in your intranet content or share the leaflet along with the quiz.



[Employee leaflet](#)

We hope this toolkit provides you with the tools for you to help employees take even more control of their finances.

If your employees feel it's all too easy to run out of money by the end of the month rest assured, they're not alone. Millions of people across the UK are just getting by financially and it can be simpler than they think to take the stresses and strains out of their finances, no matter how stretched they feel.

Lets see if we can help your employees reduce those nagging financial worries and help them relax a bit knowing they're getting on top of it.

We hope you find this toolkit useful. We'd appreciate you sharing any feedback you may have with your Client Service Manager.

Thank you.

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