

# Case study

Expanding support at retirement to a full financial wellbeing programme for all employees



Global aerospace and defence



c.4,000 employees in the UK



3 sites in the UK

## The ask

- We had supported the client for many years providing at retirement workshops to assist retirees to leave the business well prepared for retirement
- The client already offered excellent employee benefits and had recently introduced a benefits portal allowing employees to access flexible benefits, choosing those which mattered most to them
- There was no financial wellbeing programme available to the whole workforce and despite the range of employee benefits offered, the take up was low and the client felt that many employees didn't necessarily understand their benefits, or the best ones for them to use at different life stages
- With the client we discussed a proposal to develop a more inclusive, holistic financial wellbeing programme that would benefit all employees

## Outcome

- Working with the client, we created a business case to demonstrate the value of extending the financial wellbeing programme to all employees, specifically in terms of talent retention and engagement and in understanding the employee value proposition, benefits choices and take-up
- Implemented an annual programme of live career-stage events, continuing to support retirees but also adding early career, mid career and countdown to retirement events so there was something every employee could identify with and access
- Introduced a programme of live topic-based webinars to support topical issues and common life events
- Introduced a bespoke, online financial wellbeing hub accessible 24/7/365 with a wealth of information, resources, top tips, case studies, tools and modellers
- All content delivered was bespoke to the client, with details of their employee benefits alongside wider personal finance topics
- Supported the client with resources, communications and collateral to help promote a culture of awareness and innovation around the importance of financial wellbeing
- Launched a dedicated financial guidance helpline to help with individual employee queries

## Results



Client was shortlisted as one of 3 finalists in industry financial wellbeing award



overall employee satisfaction

85%



of employees would recommend the programme to a colleague

84%



of employees now book onto events each year

13%

““Very well run session with good slides. Every question was answered clearly - a great first step to financial awareness for somebody in their early career. Would recommend to other early careers staff.”

Employee service user



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