

Wealth to Health

Employee Financial Wellness Program



EMPLOYEE PACK



Welcome:

Your Company Cares About Your Financial Health

Your employer recognises that financial wellness is just as important as physical and mental health.

That's why they're offering you access to confidential Financial Health Checks - a valuable benefit designed to help you take control of your financial future.

What Is a Financial Health Check?

During a one-on-one appointment, we spend time asking you questions about your finances to gain a good understanding of where you are financially and determine whether you're on track to meet your financial goals.

You'll receive practical tools and personalised resources to use straight away or take further with your adviser. It's a simple first step toward feeling more in control of your money.





About Us

At Wealth to Health, we connect financial wellbeing with workplace performance. Our Employee Financial Wellness Program gives you confidential access to health checks, resources, and personalised support.

The company was founded by Bryan Jovanovic, an award-winning finance broker with over 15 years of executive experience, driven by his passion for improving financial literacy for all Australians. Recognised as a top 100 broker on the Connective panel, Bryan is highly regarded for his strategic problem-solving and ability to navigate complex financial scenarios with ease.

Two options for working together:

General Meeting

 20 minutes

Personalised financial wellness results

Confidential 1:1 session with mortgage broker & financial planner

Budget planner

Employee takeaway resources

Tailored Meeting

Everything in the General Meeting plus:

 60 minutes

Comprehensive credit report (Equifax & Illion)

Personalised property report

Interest rate review & market comparison

Loan structure review & debt

Consolidation guide

Superannuation & Insurance Review

Goal-setting session

What you Receive

In each confidential one-on-one appointment, you:



01

Gain a clear understanding of your current financial position.



02

Receive practical tools and tailored guides you can implement immediately.



03

Have the option to book a comprehensive follow-up meeting for deeper support.

How It Works:



BOOK

Your preferred meeting time via the Calendly link provided in this email



PREP

Provide the requested documents/information at least 48 hours before your meeting



MEET

Attend your confidential session at your workplace or via video call



REVIEW

Receive your personalised financial wellness results and resources.



FOLLOW UP

Book a 1-hour comprehensive follow-up meeting

Our Privacy Promise

Your Financial Health Check is completely confidential. None of your personal or financial information will be shared with your employer. All sessions are conducted privately, and your results are for you alone.



Frequently asked questions:

1. Is my session confidential?

Yes. Your Financial Health Check is 100% confidential. None of your personal information or results will be shared with your employer.

2. Do I have to pay for this service?

No. The Financial Health Check is provided at no cost to you—it's fully covered by your employer.

3. Do I need to prepare anything before my session?

You'll get the most out of your meeting if you bring along recent financial documents (like paystips, super statements, or loan details), but it's optional.

4. What if I already have a financial adviser or accountant?

That's fine. This check complements the advice you may already receive. You'll meet with a licensed finance broker and adviser, certified in tax, who can give you practical tools and insights to take into your next conversation.

5. Can I book outside of work hours?

Yes. Appointments can be scheduled online, and video call options are available for flexibility.

6. What happens after my session?

You'll receive your personalised results and resources. If you'd like, you can also book a 1-hour comprehensive follow-up meeting to explore your financial goals in more detail.

Why financial wellness matters

Financial stress affects every part of your life—from your performance at work to your work to your relationships and overall well-being.

When you take control of your finances, you free up energy to focus on what really matters: your career, your family, and your future.



Immediate benefits



A clear picture of your current finances.



Personalised financial wellness results.



Practical tools you can put to use right away.



Peace of mind knowing you've taken the first step towards financial control.

Long-term impact



Greater clarity and confidence with money



Relief from ongoing financial stress



Faster progress towards major goals



Stronger financial security over time



Better preparation for retirement

Don't let financial stress hold you back.

BOOK A CALL TODAY

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