

# Wealth to Health

Employee Financial Wellness Program



**EMPLOYER PACK**

# Financial stress is one of the biggest hidden costs to Australian workplaces:



88% of stressed employees say money worries affect their work — yet only 6% get support from their employer. **Aon Australia**



Financial stress costs 3 hours of productivity per employee each week — and 1 in 3 say it directly harms performance. **PwC, 2023**



Companies with financial wellness programs cut turnover by up to 33% — while lifting engagement and job satisfaction. **Global study**



We offer confidential, one-on-one Financial Health Checks for your staff. Each session reviews an employee's financial position and gives them practical tools they can use straight away, plus further guidance if needed.

This proactive approach reduces financial stress, supports mental wellbeing, and improves focus at work — all at no cost to employees and with minimal effort from HR.

## Business Impacts

### Increased Performance

Employees bring focus, not financial worries, to work.

### Higher Retention

Reduced stress boosts retention and job satisfaction

### Improved Job Satisfaction

Financial wellbeing lifts overall job satisfaction

## Simple Process

### Setup

We draft your comms; you provide a space

### Booking

Staff schedule directly with us

### Delivery

Confidential sessions on-site or on-line

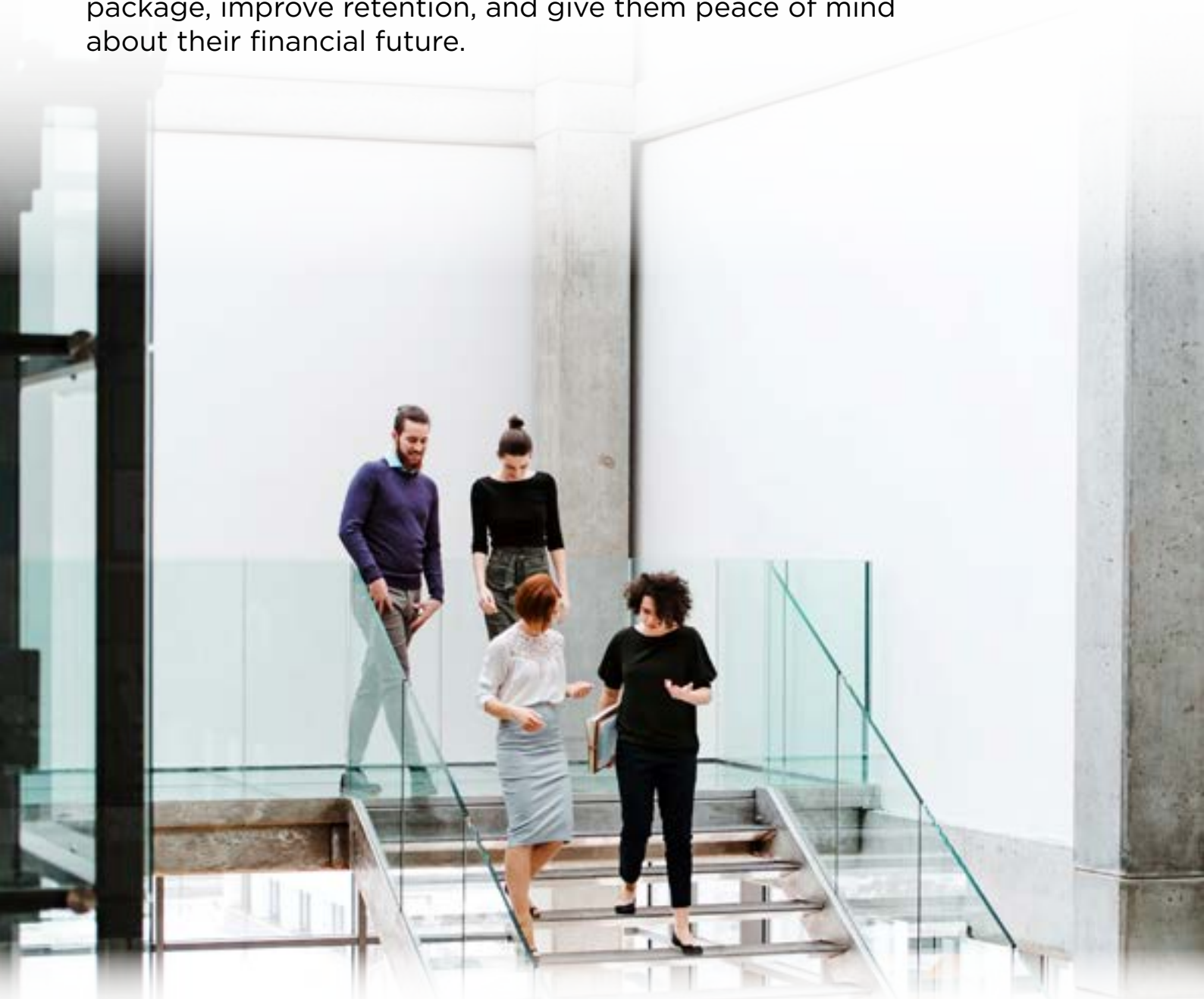
### Follow-Up

Employees get resources + tailored support

# Why Financial Wellness Matters:

As an employer, you know how important it is to have fit and healthy staff. You may already invest in physical and mental health initiatives but what about financial health?

By offering financial health checks as an employer-sponsored benefit, you add real value to your employees' salary package, improve retention, and give them peace of mind about their financial future.



# Two-Tier Service Model

## General Meeting

 20 minutes

Personalised financial  
wellness results

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Confidential 1:1 session with  
mortgage broker & financial  
planner

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Budget planner

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Employee takeaway resources

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## Tailored Meeting

Everything in the General Meeting plus:

 60 minutes

Comprehensive credit report  
(Equifax & Illion)

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Personalised property report

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Interest rate review &  
market comparison

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Loan structure review & debt

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Consolidation guide

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Superannuation & Insurance  
Review

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Goal-setting session

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# How It Works:



## **SET UP:**

You circulate a company notice (we draft this for you).



## **BOOKING:**

Employer provides meeting space, or sessions can be held at our Clayton office or online.



## **DELIVERY:**

Employees book directly via Calendly and attend their 1:1 session in person or via video call.



## **FOLLOW-UP:**

Employees can book an optional comprehensive followup meeting.

# What Your Employees Receive

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



01

Gain a clear understanding of their current financial position.



02

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



03

Receive practical tools and tailored guides they can implement immediately.

# Financially fit employees, thriving organisations

Financial wellbeing is the missing link in most workplace wellness programs.

By helping employees manage money with confidence, you strengthen focus, resilience, and loyalty — and create a culture that supports success inside and outside of work.

Through the Wealth to Health Program, your team gains access to expert-led financial health checks, giving them clarity and control while you enjoy a more engaged, productive workforce.

## Why It Matters

88% of financially stressed employees say it impacts their work. **Aon Australia**

Staff under financial stress lose focus, productivity, and loyalty.

Companies with financial wellbeing programs cut turnover by up to 33%

## What We Do

Confidential 1:1 Financial health checks on-site or online

Practical tools employees can use immediately

Minimal Admin for HR

# Benefits for your workplace



Improved productivity and focus



Higher employee retention



Reduced stress and absenteeism

Empower your people.  
Strengthen your business.

**BOOK A CALL TODAY**



Employee Financial  
Wellness Program

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