

Lifetime

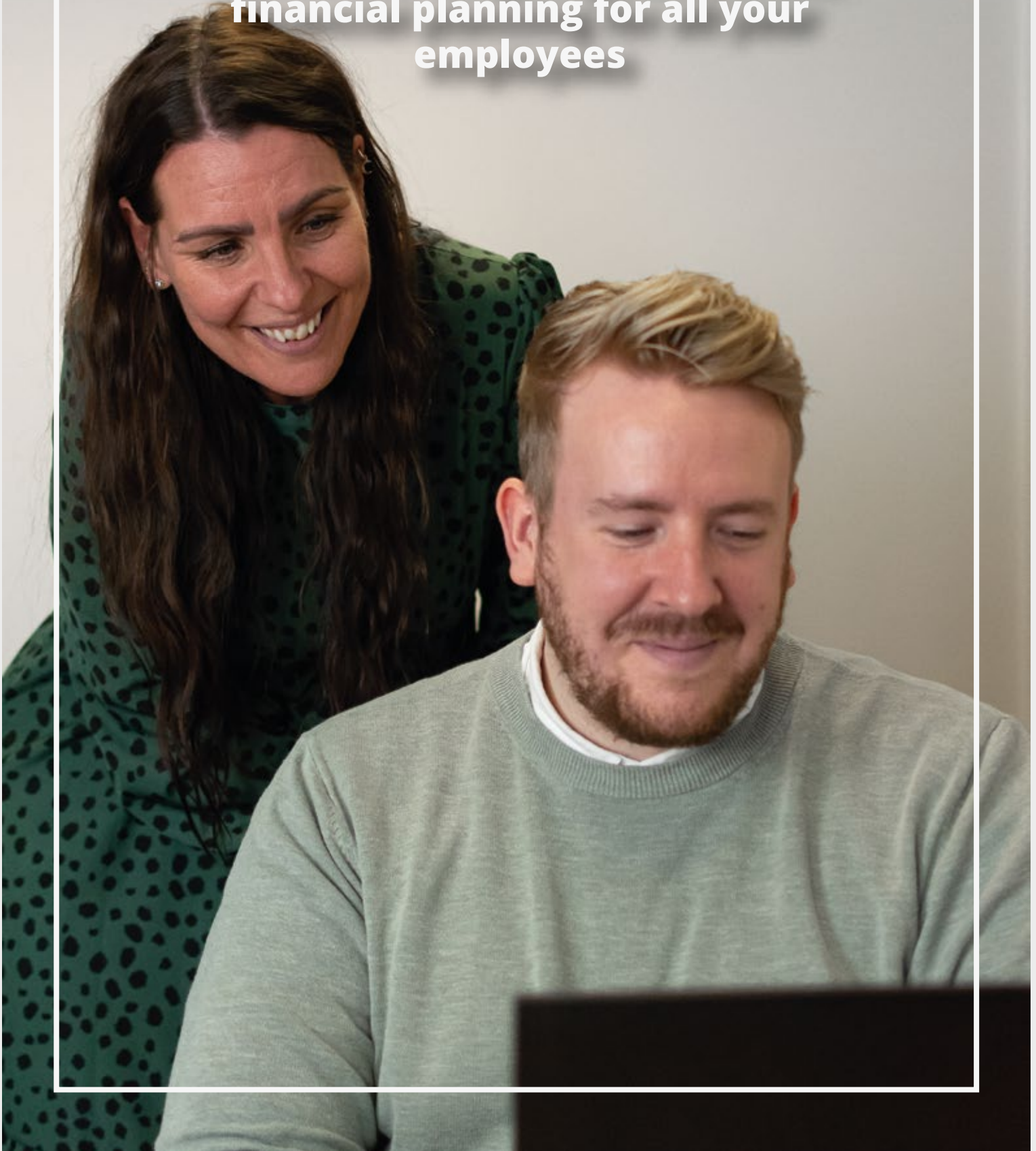
Employers Guide



**Financial wellbeing matters for
every individual in every
organisation**



**Accessible insight, guidance and
financial planning for all your
employees**





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financial
wellbeing is
important



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Why financial wellbeing matters

Life's journey can be hard and ever changing. The same can often be said about the financial journey we take.

We all go on that journey, but it is different for every single employee in every organisation. There may be some similarities but no two will be exactly the same.

Money worries are a big cause of stress for employees.

Over half of employees surveyed by Lifetime admitted to feeling stressed or worried about their current financial situation* - and 89.19% of those surveyed said they worry about their financial future.**

And money concerns is not limited to those trying to deal with debt. People worry about saving for a home, the cost of raising a family, funding relatives in care, where to turn for help with their prized savings, losing their job...the list goes on.

A lot of employers now recognise the link between financial wellbeing and productivity.

So what's the remedy? Well, a tremendous benefit for both employee and employer is an innovative financial wellbeing service.

Research shows that such a supportive service, one that gives staff insight, guidance, and education on their financial situation, results in a more engaged, happier and productive workforce. That in turn brings big benefits for the employer, helping organisations perform better, be more creative, and have reduced turnover, sickness and absences.

Protecting and empowering your most valuable asset, your employee. It is the right thing to do.

* **[Statistics taken from Lifetime 2022 employee survey]



Why partner with Lifetime?

We are specialists in workplace financial education, and an established and trusted provider of a high-quality financial wellbeing programme.

This service helps people get to grips with personal money issues, make plans for the future, and gives them the confidence to take full control of their financial situation.

We work closely with you, the employer, to deliver an end-to-end solution of financial education, planning, and advice that supports the needs of employees and improves their financial wellbeing.

We will listen to your business and your employees. Meeting the needs of every individual in your organisation is a fundamental principle in our financial wellbeing offering. We passionately believe that we can help people achieve all the things they want today, tomorrow, and for the rest of their lives.



4 reasons why *Financial Wellbeing* is important

1.



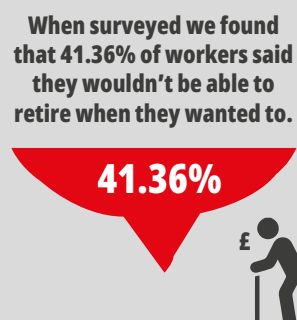
2.



3.



4.



How we will work with you and your employees

As specialist providers of workplace financial education, we can guide employees from hire to retirement, with tailored support at each stage of their careers.

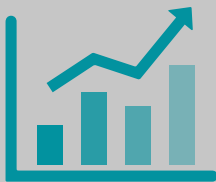
We have established a secure, passcode-protected learning hub, which contains educational content on a variety of financial topics.

Content and education have important roles to play in our financial wellbeing programme, but ultimately it is all about empowering your employees to feel confident to talk and engage with their own financial journey, and providing them with a flexible plan that they can rely on.



Our financial wellbeing programme helps employees understand their finances, giving them:

- A personal financial plan**
- Educational videos and webinars**
- Dedicated customer coaches**
- Secure employee learning hub, offering content on important financial topics**



People often seek financial advice because of a specific issue, but right at the heart of that need is one overriding thing: peace of mind. You want to make sure that you can live how you want without ever running out of money. It is an important goal and what this online financial journey with Lifetime is all about.

There is no obligation for any employee to act on advice or recommendations we make or to engage Lifetime's services beyond the employer's provision.

Ensuring everyone's security and confidentiality

Our unique digital service offers the opportunity for everyone to access good financial guidance, insight and advice, and be in a position to make informed choices about their money.

We have developed a secure online learning hub for them to provide detailed information and for us to deliver their bespoke financial plans, as well as educational videos and informative webinars.



“Lifetime guarantee to always put the wellbeing and interests of your employees first”

This dedicated solution ensures the protection of all personal data and guarantees that any information shared by your employees remains confidential.

Remote access and delivery also ensure that in a world committed to technological advances but equally aware of pandemics and virulent viruses, we can connect securely wherever you are, and everyone's safety is assured.



OUR PARTNERS

We are proud to have agreed partnerships with a number of amazing companies who offer invaluable services. Please let us know if you are interested in more information.

www.keylu.com

Keylu is a complete life management solution for all of the important areas of daily life, from organising and securely storing important information and documents, to capturing photos, videos and precious moments, ensuring they are never lost. Offering a Keylu account to employees can provide multiple benefits to your business and for your team.



www.annurca.com

Annurca Health and Wellbeing are passionate about helping your business reach its objectives through strategic wellbeing programmes. As each organisation's goals are specific to them we have ensured we have the capacity to provide you with the necessary provision. Our services can be broken down into 4 sections: Employee Wellbeing Initiatives, Mental Health, Resilience Training and Occupational Health.



www.thehappinessclub.co.uk

The Happiness Club provides a 12-month Colleague Resilience Programme, designed to proactively support good mental health and build emotional resilience. Employees receive daily strategies, a library of webinars, meditations, audio's and online courses as well as having the option of 24/7 access to qualified therapists for ad hoc, in the moment support and advice.



www.beneficialfamilywills.co.uk

Beneficial Family Wills has been established for more than 20 years and provides a full range of Inheritance Planning services. Providing a full-service solution from Wills to Trusts and Lasting Powers of Attorney, their personal approach supported by digital communications ensures you can achieve peace of mind.



Beneficial
Family Wills
Securing Families Futures Nationwide

Contact Us

DROP US AN EMAIL:

communicationsdept@lifetime-fm.com

CALL US:

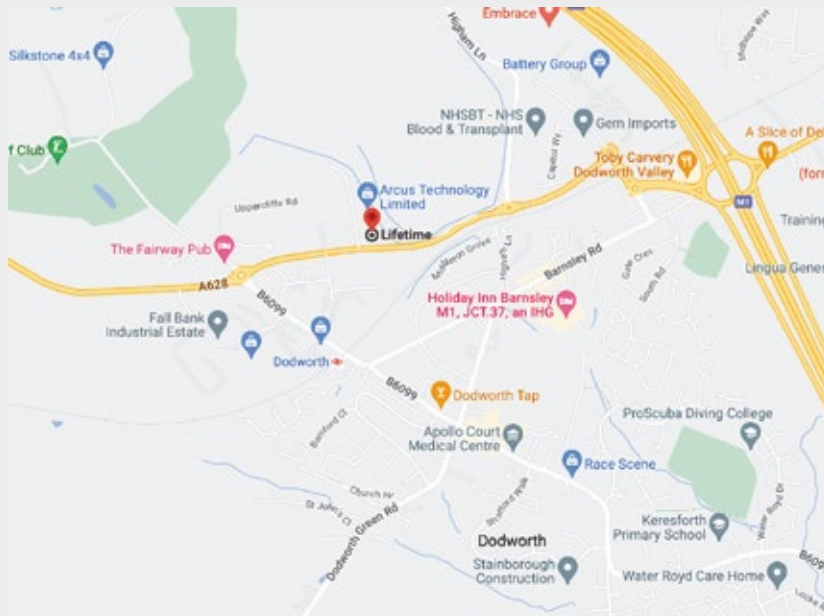
01226 208600

VISIT OUR WEBSITE:

www.lifetime-fm.com



Where can you find us?



Lifetime House, Great Cliffe Road, Dodworth, Barnsley S75 3SP

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