

SUPPORTING FINANCIAL EDUCATION IN THE WORKPLACE

29 June 2017

WORKING TOGETHER
Promoting financial education in the workplace



Following the launch of our Financial Education in the workplace initiative in conjunction with SecondSight, the team and several of our clients attended the SecondSight Annual HR Masterclass.

The sessions which covered some of the most popular, easily achievable areas of wellbeing in the workplace were engaging and forward thinking with speakers:

- **Baroness Ros Altmann, CBE**, sharing her thoughts on pension savings and the future of retirement planning, and;
- **John Hoffmire, Associate at the Centre for Mutual and employee-owned University of Oxford** discussing financial wellbeing using the Financial Wellness Score.

As part of the Yorkshire Building Society Group, YBS Share Plans have provided employee share plan services for over 37 years, and as a mutual organisation it is very important to us that the employees of our corporate clients make the right decision and where possible maximise their personal wealth creation.

Through our research with the universities of Durham and Leeds we found some interesting statistics - one of the key statistics being, 35% of participants would have no other form of savings if they didn't participate in a share plan through their employer.

This is just some of the insight that made us form a relationship with the team at SecondSight, to provide financial education in the workplace both at the decision making process (should I join?) and when the plan reaches maturity or the shares vest.

We have used various media to achieve this and support financial education and wellness in the workplace with excellent results for our customers.

[CONTACT THE TEAM FOR MORE INFORMATION.](#)



Case Studies

Examples of tailored customer communications.

- Dynamic marketing and communication strategies
- Innovative and forward thinking

[View Case Studies](#)



YBS Awards

Find out more about YBS Group and the awards they have won.

[More about Awards](#)

