

Financial Education in the Workplace

87%



of employees WANT financial education



3:1

or more ROI for employers who offer employees quality financial programs



\$2,000

a year employers can save from a financially healthy employee



86%

of employees will participate in financial education



48%

are willing to pay some or all of the costs



51%

have not sought financial advice in the last 24 months

86%

feel that it is very to extremely important to have an **EXPERIENCED** financial educator providing financial education

80%

feel it is very to extremely important to have an **ACCREDITED** financial educator providing the education



Preferred times to participate in a financial education program are:



Preferred formats for receiving financial education:

EMPLOYEE PREFERENCE COST LEARNING EFFECTIVENESS





How employees are currently receiving their financial education:



25%
live webinar



64%
live seminar

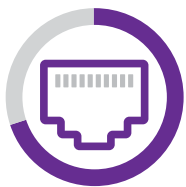


45%
online self-study



30%
one-on-one coaching

Employees whose company provides financial education:



70%
receive it through online/self-taught or live webinars



68%
find the financial education provided to be very useful



65%
said their financial education came directly from their employer



45% feel their level of financial stress today is high to overwhelming

61% cited money as their #1 stressor

52% indicated distress over financial matters contributed to irritability, anger, fatigue and sleeplessness

1 hour/day

employees experiencing financial stress spend 13% of their workday dealing with money



<40% are satisfied with their present financial situation



To learn more about employee financial education for your business please contact:

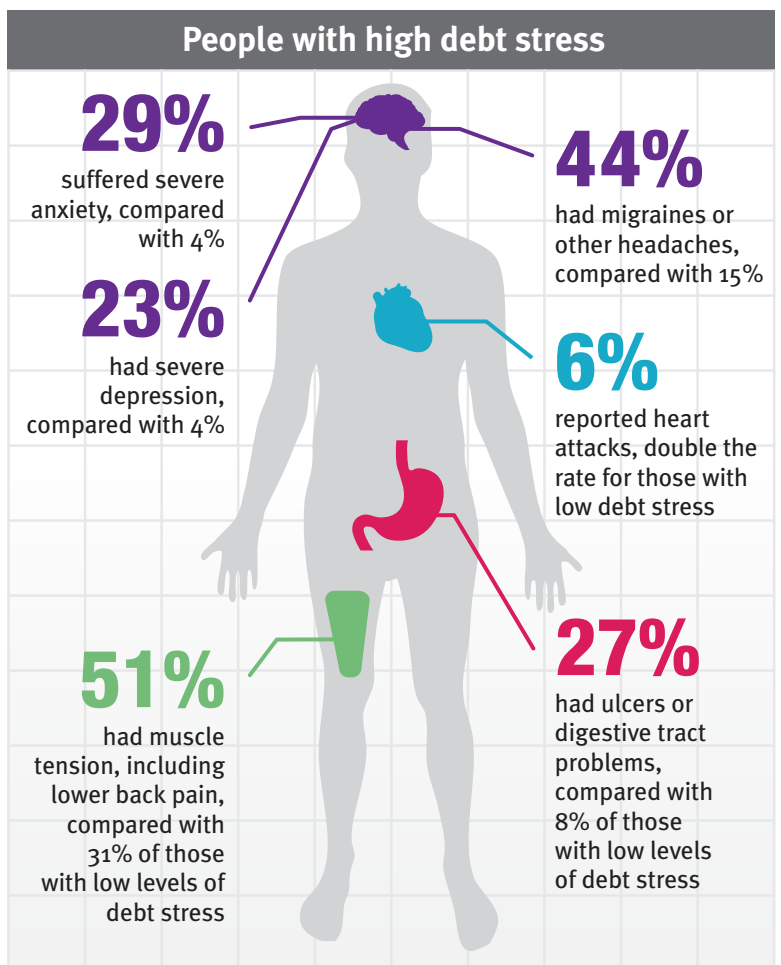
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Studies are from: US, Canada, UK and Australia

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Sources: Employee Financial Education Division – Financial Education in the Workplace Survey (Dec. 2011). Employee Financial Education Division – Whitepaper: Increase Profitability Through Employee Financial Literacy – Restore Productivity and Regain Organizational Commitment Through Employee Financial Education. Proposal to the Federal Task Force on Financial Literacy: “Educating Employers on the Value of Educating Employees on Financial Literacy”



<31% of companies measure participation and engagement

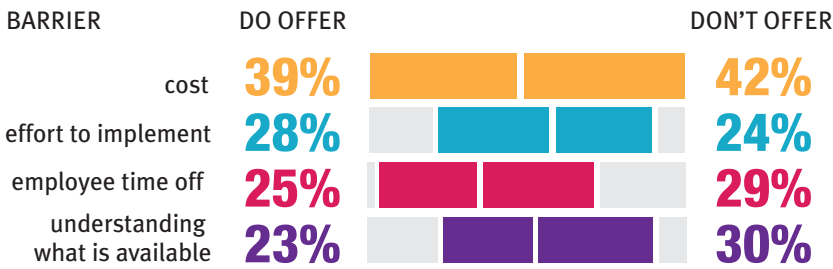


56% NEVER plan to measure participation and engagement

Reasons for offering employees financial education:



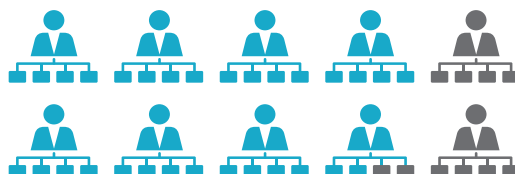
Barriers to offering employee financial education:



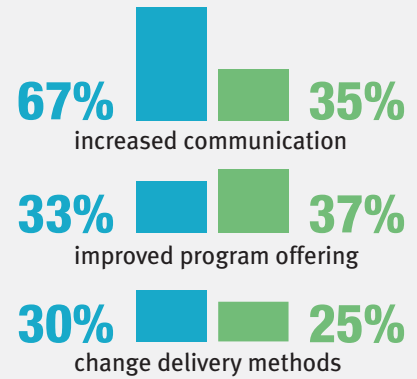
Companies believe financial education could:



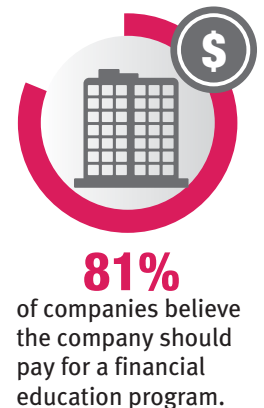
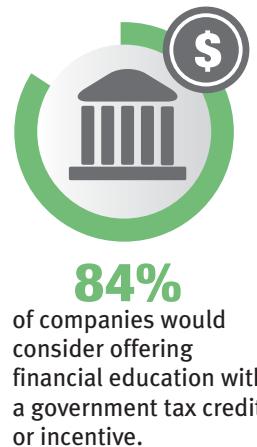
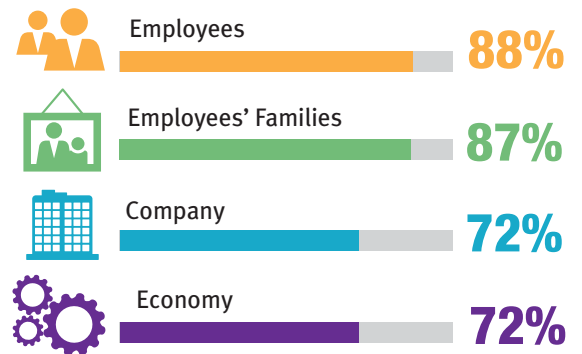
78% of companies would provide separate financial education for their senior executives.



Top 3 ways companies are TRYING to improve participation and engagement vs **WANT to improve participation and engagement**



Companies agree that employee financial education is a valuable benefit to the:



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