

Quilter's financial wellbeing programme as an employee benefit

Helping you foster a positive, engaging company culture, and stand out as a leading employer in a competitive market.

Quilter
Financial
Advisers



Quilter is one of the UK's leading wealth managers. We proudly serve over 500,000 customers* with high-quality wealth management services, including financial advice, products and investments, and award-winning customer service.

**as at 31 December 2024*



What is Quilter's financial wellbeing programme?

At Quilter, we're passionate about joining forces with organisations to empower their employees with the knowledge and tools to achieve financial security and build a better, more confident future.

Through our financial wellbeing programme we partner with employers, unions, and networks across the UK to provide their employees and members with meaningful financial education, supported by access to tailored financial advice.

The programme is designed for organisations like you who want to:

- ✓ reduce staff stress and sickness
- ✓ boost productivity
- ✓ improve staff morale and retention.



As an organisation, this can enable you to:

- ✓ enhance your reputation for employee care
- ✓ show you are a forward-thinking, insightful employer
- ✓ become an employer of choice.



A black and white photograph of three people sitting around a wooden table in an office. On the left, a woman with her hair in a bun, wearing a light-colored blazer, is smiling and looking towards the center. In the middle, a woman with curly hair and glasses, wearing a patterned top, is also smiling and looking towards the right. On the right, a man with a beard and glasses, wearing a sweater over a checkered shirt, is looking towards the center. A laptop is open on the table in front of the woman on the left. The background shows large windows and a potted plant.

What do you get?

The programme offers unique benefits that help your employees feel supported and valued, including a calendar of financial education events for your organisation, follow-up financial surgeries, and free initial financial advice consultations for your employees.

Read more on page 8.



Why choose Quilter as a partner for your employees' financial wellbeing?

A convenient way to reduce the risks associated with neglecting your employees' wellbeing

There's no charge to your organisation for our financial wellbeing programme and partnering with Quilter means you're mitigating risks associated with employee financial advice. Our service is safe, secure, and confidential for both employer and employee data.

Building on years of experience working with networks, unions, and member groups, we're currently trusted and retained by over 50 partner organisations across the UK. As a partner organisation, you'll have access to your own dedicated relationship manager who looks after your services from us.



“...we're currently trusted and retained by over 50 partner organisations across the UK.”

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Quilter Financial Advisers: the trusted home for financial advice

All your employees' financial advice will be delivered by our dedicated financial advice business, Quilter Financial Advisers. Whether your employees are saving for the future or planning for a comfortable retirement, we're here to support their financial journey .

We're trusted by our customers



Reviews 10,603 • Excellent



Rated Excellent as at May 2025

We're financially very strong



FINANCIAL STRENGTH RATED

PLATFORM SECTOR **SUPERIOR**
QUILTER INVESTMENT PLATFORM LTD

How looking after your employees' financial wellbeing can benefit you

Evidence shows that the journey to financial freedom starts with education. Our tailored financial education events and resources offer your employees the guidance and expertise they need to achieve their financial goals.

Our expert help can help your employees feel supported, safe, and valued, improving staff morale and retention.

So, you can:

- ✓ Enhance your reputation for employee wellbeing.
- ✓ Reduce staff sickness and stress. Financial wellbeing leads to happier and more productive employees.
- ✓ Nurture employees. We'll help you ensure your employees feel supported and valued so they can be more productive.

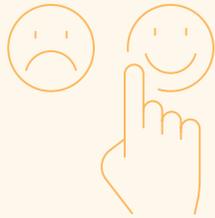


How Quilter's financial wellbeing programme helps your employees

Through our financial education events and resources, tailored specifically for you as our valued partner organisation, we offer your employees the guidance and expertise they need to achieve their financial goals.

Our financial wellbeing programme ensures your employees feel supported with a regular calendar of financial education events. By providing valuable insights into various aspects of financial planning, we help them make informed decisions about their financial future.





Enhance employee satisfaction and retention with innovative offerings.



Access expert financial advice to support your workforce.



Foster a positive company culture with unique wellness initiatives.



Stand out as an employer of choice in a competitive market.

“

Our financial wellbeing programme ensures your employees feel supported with a regular calendar of financial education events.

What the financial wellbeing programme includes

Enjoy a full calendar of financial education and resources

- ▶ Financial education events – every quarter
- ▶ Employee financial surgery – after each quarterly event
- ▶ Educational articles for you to share
- ▶ Online financial engagement portal – available 24/7
- ▶ Free initial financial advice consultation – once for every employee

Read more about the different areas of our service on the next page.

“Each of your employees can benefit from £1,000 worth of financial education events every year.”



1. Quarterly financial education events



Each member of your workforce can join our free quarterly events (usually £250 per event) covering topics such as pre-retirement planning, general financial planning, mortgages, pensions, and family protection.

Some of our most popular quarterly events are:

- ▶ Financial wellbeing.
- ▶ Pre-retirement planning, general financial planning, mortgages, pensions.
- ▶ Protecting your family financially.
- ▶ **★ Plus: Bespoke presentations as required. ★**

2. Follow up financial surgeries



- ▶ Our follow-up financial surgeries are typically arranged as on-site, pre-booked appointments which take place two weeks after each quarterly financial education event.
- ▶ This free 30-minute follow-up session allows employees to discuss their personal financial situations with a financial adviser and receive appropriate advice.
- ▶ Each employee can enjoy one free follow-up financial surgery a year.

3. Individual, personal advice – 30-minute free initial consultation

To give each employee clear, individual guidance on their own financial journey, we provide a free initial financial advice consultation where we'll help them assess their financial situation, set goals, and plan the steps to achieve them.

4. Online engagement portal

Available 24/7, your employees can explore an extensive collection of guides, factsheets, calculators, and additional resources through our online engagement portal.

Quilter Invest

Quilter Invest – a simple, direct way to invest

Your online engagement portal gives your employees access to the Quilter Invest app, an easy-to-use educational and investment app which offers information on topics like monthly budget planning and understanding what APR is, plus guidance on how to take the first steps to opening a savings or investment account.



★★★★★

"Awesome and user friendly with clear details."



★★★★★

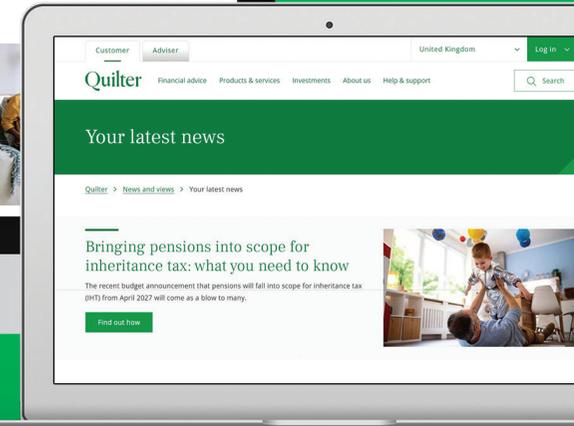
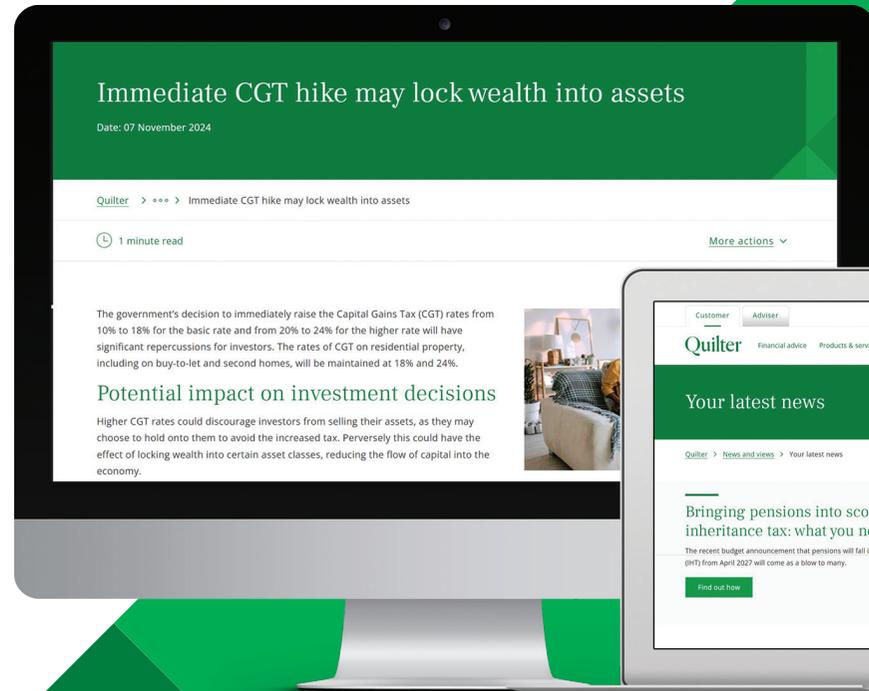
"Easy to use for a total beginner. The customer service is amazing, very quick to answer any questions and resolved issue easily."



5. Educational articles for your intranet or employee newsletter

To enhance the value of your internal communications, we'll provide you with regular articles that you can share with your employees (for example in your corporate newsletter or on your intranet), covering meaningful and practical topics such as:

- ▶ Life stages of financial planning
- ▶ Strategies to reduce inheritance tax
- ▶ Maximising pension tax-free cash
- ▶ The impact of cash ISAs
- ▶ Financial literacy for children



Quilter: a name you can trust

Don't just take our word for it. Here are what some of our other partner organisations are saying:



“The programme’s educational articles and events have provided me with valuable insights into financial planning. I highly recommend it to all employees.”



“I feel more secure and valued knowing that my company cares about my financial wellbeing. The free consultations and surgeries have been incredibly helpful.”



“The financial education programme has been a game-changer for me. The financial advice and educational events have helped me plan for my future with confidence .”



Next steps

Get in touch with a member of our partnership team now to discuss your needs and how Quilter can support your organisation and employees.



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Quilter Foundation

The Quilter Foundation is Quilter's charity. The Quilter Foundation provides vital funding to carefully selected charitable organisations, focusing on education, employment and health & wellbeing.

To find out more visit:
www.quilter.com/the-quilter-foundation

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