



# 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 formats for receiving financial education:

EMPLOYEE PREFERENCE COST LEARNING EFFECTIVENESS



### Preferred times to participate in a financial education program are:





**How employees are currently receiving their financial education:**



**25%**  
live webinar



**64%**  
live seminar

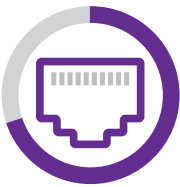


**45%**  
online self-study



**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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**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”

