

# Delivering Good Outcomes

Say Hello

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## Communications case study



### The problem

A long-standing Punter Southall client wanted to introduce a global wellness programme focussing on four areas: Nutrition, Social, Financial and Physical. Punter Southall supported the financial aspect of the UK programme through our specialist financial education service, MyAspire.



### The issues

The employer provided a range of benefits to its employees, who varied in age and job role.

It wanted to ensure that its employees were fully informed of their options ahead of retirement.

It also wanted to draw attention to the specific benefits provided in order to raise awareness levels and improve value appreciation.



### The solution

We were able to use our specialised financial education service MyAspire to provide a tailored solution.

We ran employee workshops covering a number of financial topics (e.g. Mortgages, Short-term borrowing, Pensions and other savings, Death benefits and will writing, and Tax planning).

The content of the workshops was tailored to the audience to ensure that the right messages reached the right groups.

Punter Southall advisers were available after the sessions to speak to attendees on a one-to-one basis if required.



### Actions for employers

Over a quarter of all employees attended the workshops.

The feedback from the employer and the attendees was tremendously positive. Attendees were given a list of actions with a call for them to engage with at least some of the tasks in order to improve their financial position.

The majority have confirmed to the employer that they have taken positive action as a result.

A significant number of individuals also reviewed the level of contributions made to their pension plans.

MyAspire now forms part of the ongoing financial wellness programme and will enable the level of engagement and understanding to grow.

*Aspire*  
Punter Southall



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