

## **NEW roundtable group: financial education & wellbeing**

Financial education & wellbeing should go hand-in-hand with responsible employee share plan practices. Now more than ever before, it's important to ensure that employees are making informed decisions about their share plans as part of a holistic view of their personal finances. Employers have an increasingly important role to play and they also stand to benefit in terms of reduced sickness absence due to stress, greater productivity and better employee engagement.

ProShare is launching this new group to help:

- shine a light on current and emerging best practice,
- plan issuers who are thinking about offering financial education or financial wellbeing programmes to their employees, and
- any member with an interest in this area to develop their knowledge and awareness further.

This is not a 'selling' group, there will be no pitching of services and products. The group will meet every few months over breakfast or lunch (for which we're seeking sponsorship) to hear case studies from companies and providers on how they've put in place financial education and wellbeing strategies for their workforces, the results achieved and how practical challenges were overcome. This is in the broader context of responsible share ownership and financial wellbeing.

As this is not a formal focus group (which is a members-only benefit), we're delighted to invite all plan issuers, advisers and industry organisations to participate, regardless of membership status with ProShare.

Please contact Gabbi ([gabbi@proshare.org](mailto:gabbi@proshare.org)) if you're interested in joining the group.