first actuarial
A Gallagher Company

Our financial wellbeing services

Today's employers can't afford to overlook financial wellbeing in the workplace. People everywhere are struggling with their personal finances and have no idea how to plan for retirement.

First Actuarial is a leading provider of financial wellbeing services in the UK. We work with employers to put together programmes of all sizes.

Engagement is the key to a successful financial wellbeing programme.

We know how to capture people's attention, keep everything simple and minimise digital overwhelm.

In person, our consultants know to put people at ease so everyone can ask the questions they really need the answers to.



Your bespoke financial wellbeing programme can include:

Webinars
Covering topics like pensions, savings, debt, tax and mortgages.

Financial one-to-ones
Answering questions and discussing problems privately, on pensions and wider finances, without providing regulated financial advice.

Modellers
Including our bespoke Financial MOT tool and Retirement Planner

Videos
Engaging videos on a range of financial topics, to create learning pathways.

Panel sessions
Live sessions with panels of experts on financial topics, with 'podcast style' catch-up facility.

Site visits
In-person one-to-ones, presentations and pop-up stalls.

Helpline
Answering queries through a mobile helpline and inbox.

Website
A bespoke website full of helpful information.

Let's work together on your financial wellbeing programme

Our financial wellbeing team will start by taking the time to understand your organisation, its people and your goals.

We will then apply our expertise to:

- Design and deliver a financial wellbeing programme tailored to your people
- Provide the tools and resources that your people need most
- Evolve the programme over time in response to feedback and to keep it fresh.

"First Actuarial consultants bring finance to life with useful information and practical tools. They're easy to work with, and people trust them. You get the sense of being in safe hands."

Julie Cridland,
Employee Experience Lead,
Aster Group

Get in touch

Our team of financial wellbeing consultants help employers deliver financial wellbeing services designed around their employees' lives.

We'll agree a fixed fee and stick to it. And we won't try to sell you anything you don't need.

Contact us to find out about any of our financial wellbeing services.



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