

Financial Wellbeing with Octopus Money

octopus
money

Your
company



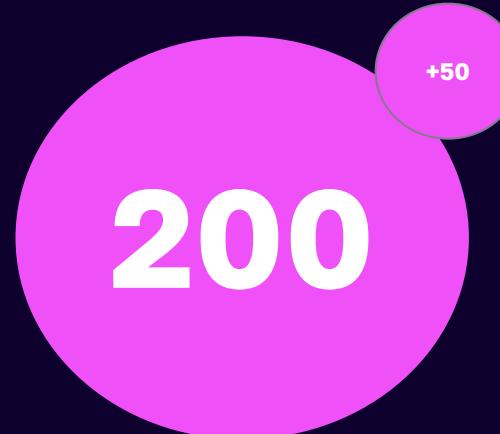
Overall engagement



Free sessions booked



Sessions held



Employees signed up to
full financial planning

Conversion:

60%

33%

What do your colleagues think?



I've been impressed and even taken aback at the quality of conversation with my coach and how its made me **think about things bigger than money.**

For me and my family, it already **paid for itself after just two sessions**

The coaches are outcome-oriented, focused on ensuring that we make tangible changes in our families lives

After years of confusion and bad financial habits, I appreciate that my coach is **very personable** and recognises my need for some emotional (not just purely financial) support

It's great to have a friendly face to talk to, to bounce ideas off of and to explain things in a relatable way. Coaches can really understand your situation and **point you in the right direction**

I'm looking forward to putting together an action plan for my financial future

Types of coaching sessions booked and held



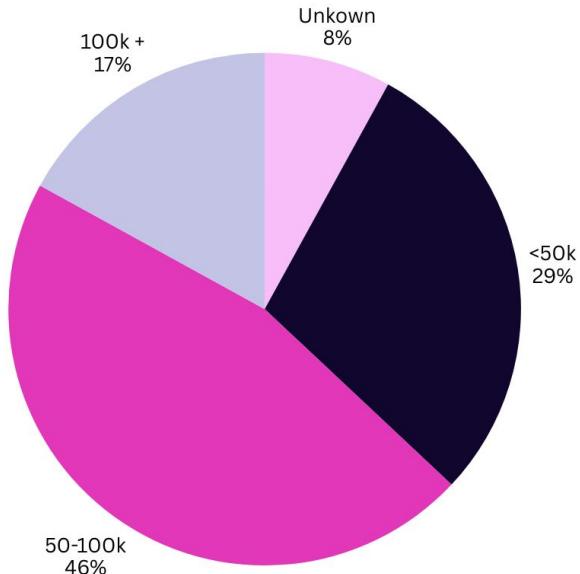
Session type	# sessions* of that type	% sessions held
Starter session	700	70%
Planning session	200	60%
Action session	90	66%
Catch up session	10	50%
Ongoing sesion	0	0%
Total	1,000	62%

We support employees across all salaries and ages



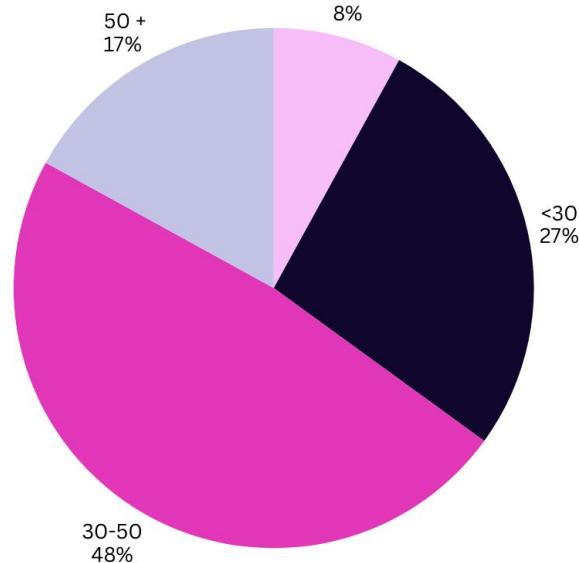
Gross salary

• Unkown • <50k • 50-100k
• 100k +



Age

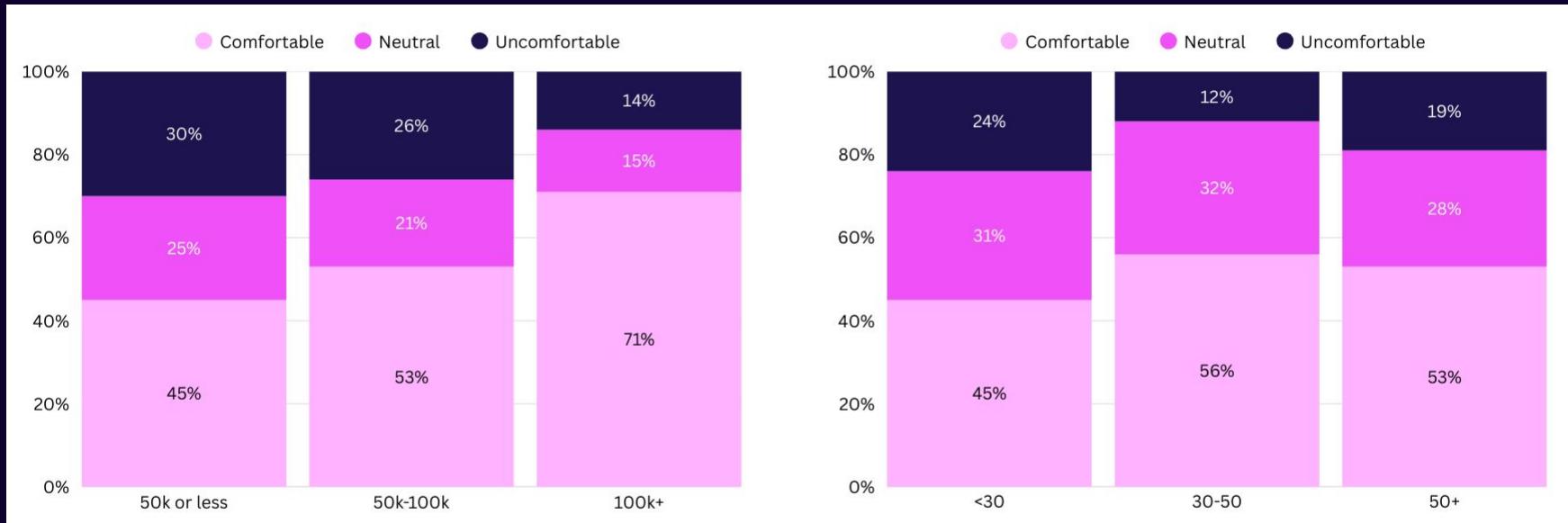
• Unkown • <30 • 30-50 • 50 +



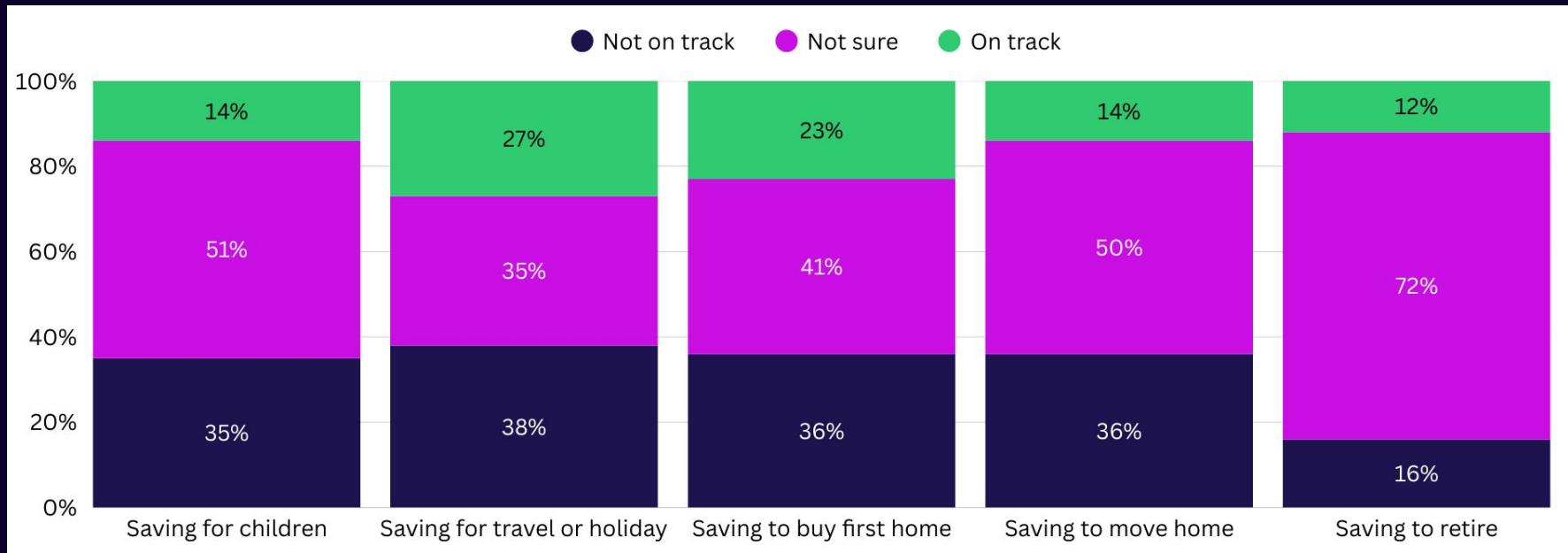
Top priority: Retiring comfortably



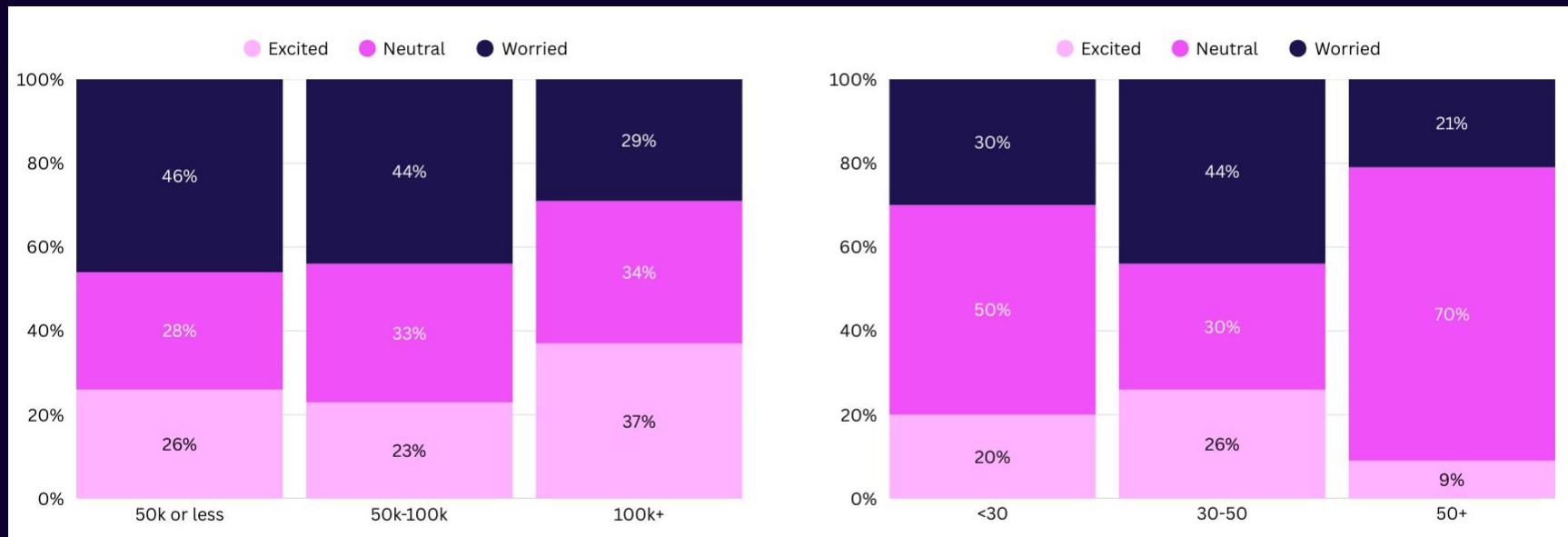
How confident do your employees feel managing their finances?



...but some are off track from their goals



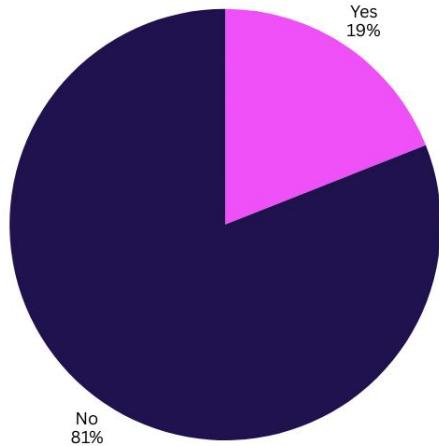
Many employees, especially 30–50 year olds, are worried about their futures.



In general, colleagues do not have sufficient protection in place

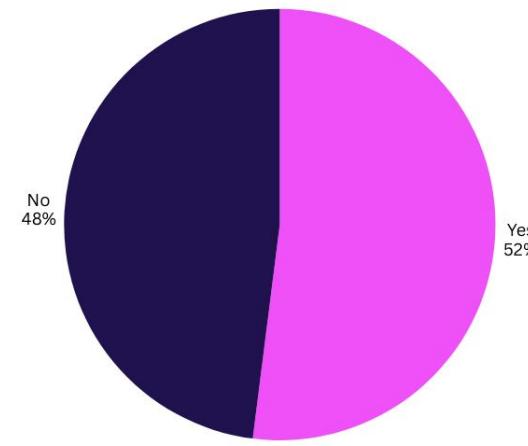
Do you have a will?

● Yes ● No



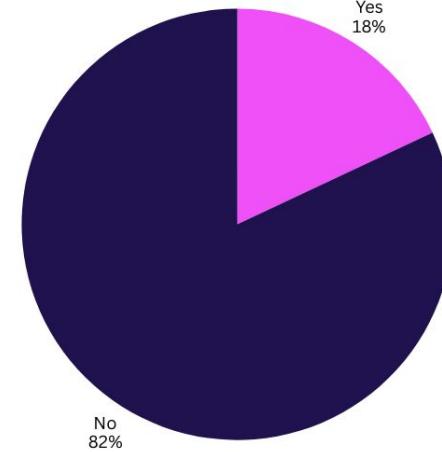
Do you have life insurance?

● Yes ● No

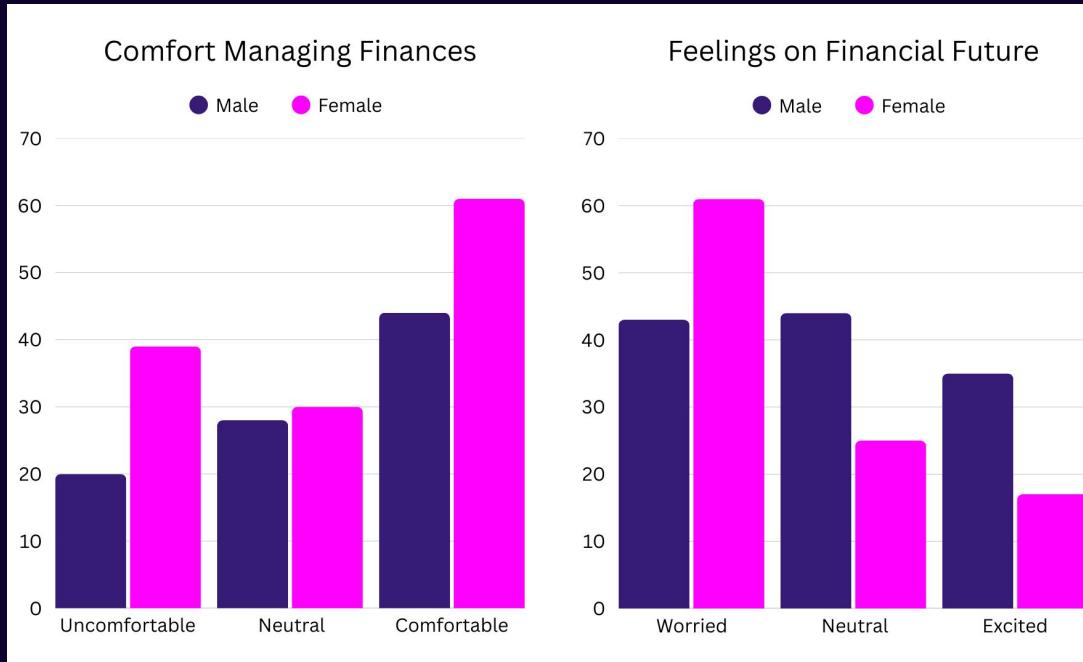


Do you have critical insurance?

● Yes ● No



Female employees are less comfortable and excited than male colleagues

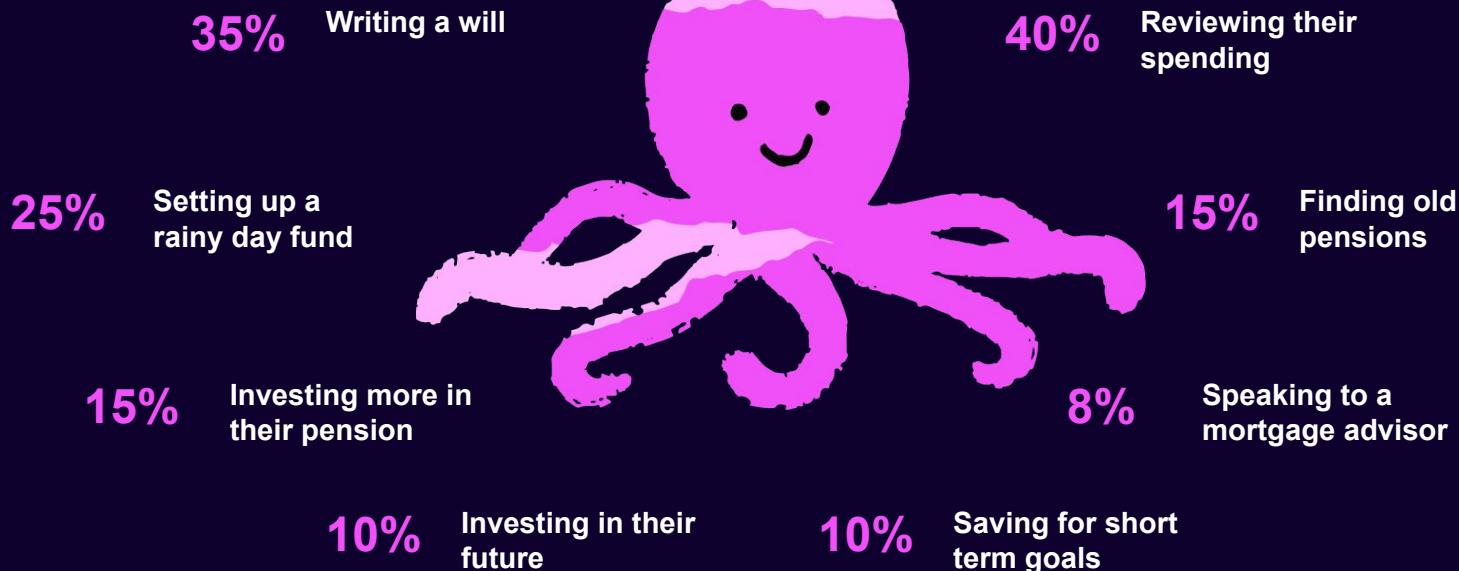


How your employees are performing: male / female comparison

Data	Female	Male	Overall
Average age	**	**	**
Average salary	£**, ***	£**, ***	£**, ***
Average investments	£**, ***	£**, ***	£**, ***
Average pensions	£**, ***	£**, ***	£**, ***
Average savings	£**, ***	£**, ***	£**, ***
Average non-mortgage debt	£**, ***	£**, ***	£**, ***

The impact of Octopus Money

The actions your colleagues are taking with our coaches



How our guidance is impacting your employees' retirement.

£500K

Retirement fund without guidance

£800K

Retirement fund with guidance



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