



Empower Your Team with Financial Confidence



Employee Financial Wellness Solutions Powered by MoneyPlan.coach

Simple, practical, judgment-free financial support for your team.

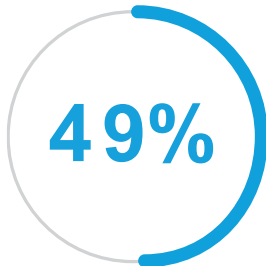
Why Financial Wellness at Work Matters?



1 in 3 Kiwis worry about money every day.



35% of employees report that issues with personal finances have been a distraction at work.



49% of those who are distracted by their finances at work say that they spend three hours or more at work each week thinking about or dealing with issues related to their finances.

At MoneyPlan.coach, we support your employees in taking control of their finances – so they can focus on what matters most at work and at home.

What I Offer

We tailor our Employee Financial Wellbeing Program to suit your business size, goals, and budget. Whether you're after a simple starting point or a comprehensive program, we've got you covered.

Starter Package Awareness & Action	Growth Package Ongoing Support	Premium Partnership Full Support
KICK-START FINANCIAL WELLBEING WITH ESSENTIALS	BUILDING MOMENTUM WITH SUPPORT AND PRACTICAL TOOLS	GO ALL-IN ON YOUR TEAM'S FINANCIAL WELLBEING
<ul style="list-style-type: none">✓ One interactive financial wellbeing workshop (on-site or online)	<ul style="list-style-type: none">✓ Quarterly financial wellbeing workshop (on-site or online)	<ul style="list-style-type: none">✓ Everything in Growth Package
<ul style="list-style-type: none">✓ Access to our financial health assessment tool for all employees	<ul style="list-style-type: none">✓ Toolkit for all employees: Budget templates, Cashflo guides and financial planner.	<ul style="list-style-type: none">✓ Custom online portal for your company.
<ul style="list-style-type: none">✓ Access to 1:1 financial coaching for all employees invoiced only when they use it.	<ul style="list-style-type: none">✓ Quarterly activity report for HR/management	<ul style="list-style-type: none">✓ Annual financial wellbeing survey + strategy session.

Custom packages are also available on request to suit unique needs.

How It Works

1. **Book a Discovery Call**
Tell me about your goals, team size, and needs.
2. **Choose a Package or Build Your Own**
I'll send you a simple proposal and onboarding guide.
3. **Launch & Support**
I handle everything from rollout to reporting, with ongoing support and regular check-ins.

Let's Build a More Financially Confident Workplace Together.

 luis@moneyplan.coach

 www.moneyplan.coach

+64 274 841 467