



Financial Wellness Partnership

Supporting Your Team Through Life's Biggest Milestones

*"Helping your employees secure their homes,
so they can focus on their work."*

The Challenge

Financial stress is the **#1 cause of lost productivity** in the UK. With the mortgage market moving faster than ever, employees often spend work hours worrying about renewals, interest rates, and family protection.

Research shows that **60% of UK employees** say financial anxiety affects their ability to focus at work. For many, buying a first home, moving house, or dealing with rising mortgage costs creates uncertainty that impacts wellbeing, focus, and productivity.

The Solution

B Mortgage Services offers a **no-cost partnership** that brings expert mortgage and insurance advice directly to your workforce. We act as a dedicated financial concierge for your team, ensuring they have the right home financing and the right protection in place.

Providing access to clear, impartial mortgage guidance demonstrates genuine care — and helps employees make informed decisions with confidence.

What We Offer Your Employees

- ✓ **Whole-of-Market Mortgage Advice**

Access to 100+ lenders and thousands of deals not available on the high street.

- ✓ **Financial Wellness Check**

A personalised report covering mortgage readiness, affordability, resilience, and protection.

- ✓ **Protection Planning**

Tailored advice on Life Insurance, Critical Illness, and Income Protection.

- ✓ **Fee-Free Initial Consultations**

A dedicated advisor for every member of staff, from first-time buyers to experienced investors.

- ✓ **Jargon-Free Guidance**

Education on the mortgage process, making home-buying stress-free.

Benefits to Your Business

Benefit	Impact
Increased Productivity	Reduces the time employees spend managing personal admin during work hours
Enhanced EVP	Strengthens your Employee Value Proposition with a high-value, practical benefit
Zero Cost	Our workplace partnership schemes are free for the employer to implement.
Duty of Care	Demonstrates a genuine commitment to employee mental and financial health.
Recruitment Edge	Stand out in the talent market with specialised financial wellness support.

How It Works

1. Onboarding

We provide digital assets (emails/intranet copy) to announce the service to your team.

2. Engagement

We offer 1-on-1 virtual consultations or 'Lunch & Learn' webinars on market trends.

3. Ongoing Support

Your team gains a permanent point of contact for all future financial moves.

No system integration, no payroll involvement, and no ongoing admin.

'Lunch & Learn' Workshop Topics

We offer educational workshops to tackle the current UK economic climate:

- **Mortgage Myths & The Current Market**

A 30-minute deep dive into UK interest rates. Stops 'water cooler panic'.

- **The First-Time Buyer's Roadmap**

Building credit scores, deposit truths, and modern schemes. Great for Gen Z/Millennials.

- **Protecting Your Paycheck**

The difference between employer cover and personal protection needs.

- **Remortgaging Without the Stress**

The 6-month window, avoiding SVRs, and releasing equity.

Ready to Support Your Team?

B Mortgage Services

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Your home may be repossessed if you do not keep up repayments on your mortgage.