

Well
FINANCIAL



Employee
BENEFIT

Your life, better.

The BENEFIT



At Well Financial we believe financial wellbeing is fundamental to a fulfilled life. Through expert mortgage advice and a deeply personal service, we support clients with care, discretion and confidence.

Financial wellbeing has become an essential component of a resilient, engaged, and high-performing workforce.





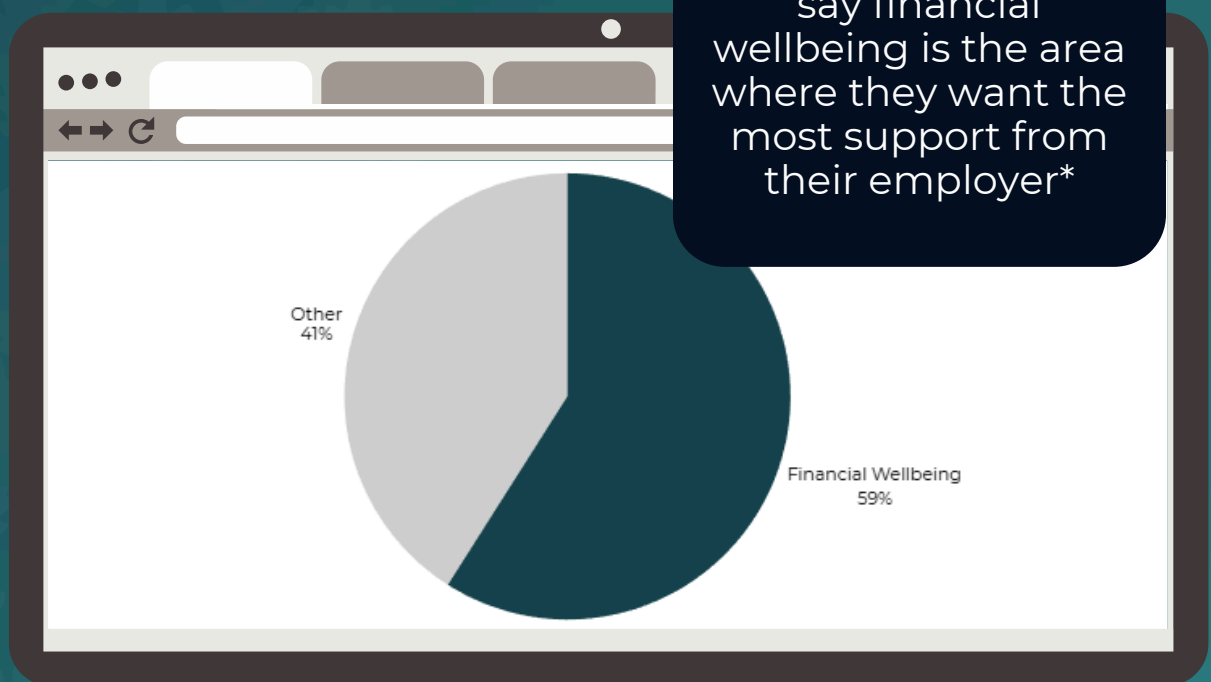
By partnering with Well Financial, **you can offer your employees completely free professional mortgage advice**, helping them make confident decisions around one of life's most significant financial commitments.

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EMPLOYEE *Insights*

59% of employees say financial wellbeing is the area where they want the most support from their employer*



*This statistic comes from WTW's Global Benefits Attitudes Survey of 6000 UK Employees, and shows a significant gap between what employees want (financial wellbeing support) and what employers currently prioritise.

65%

of employees think having a financial wellbeing policy is important when considering a future employer.*

81%

UK Gen Z would choose to buy a home if they could, yet many are less certain about navigating the process.**

About two-thirds of employees say financial stress negatively affects their work performance.***

We help solve this by giving employees expert mortgage guidance that **reduces financial stress** and supports **long-term financial wellbeing**.

*According to research published by the UK's Chartered Institute of Personnel and Development (CIPD)

** According to research published by National Centre for Social Research

*** According to a 2025 Morgan Stanley State of the Workplace Financial Benefits study

WHAT YOUR EMPLOYEES *Receive*

- 100% FREE MORTGAGE ADVICE AND ARRANGEMENT
- ACCESS TO ONE OF THE LARGEST AND MOST COMPREHENSIVE PANELS OF MORTGAGE LENDERS AVAILABLE
- SUPPORT FOR LANDLORDS, FIRST-TIME BUYERS, HOME MOVERS AND REMORTGAGES
- EXPERTISE IN COMPLEX AND SPECIALIST CASES
- A FRIENDLY, CONFIDENTIAL AND PERSONAL SERVICE



or life, better.



EXCLUSIVE
ACCESS TO A
CUSTOM
WEBSITE
UNIQUE TO
YOUR
BUSINESS

EXPERT UK
MORTGAGE &
INSURANCE
BROKERS

FCA
AUTHORISED
&
REGULATED

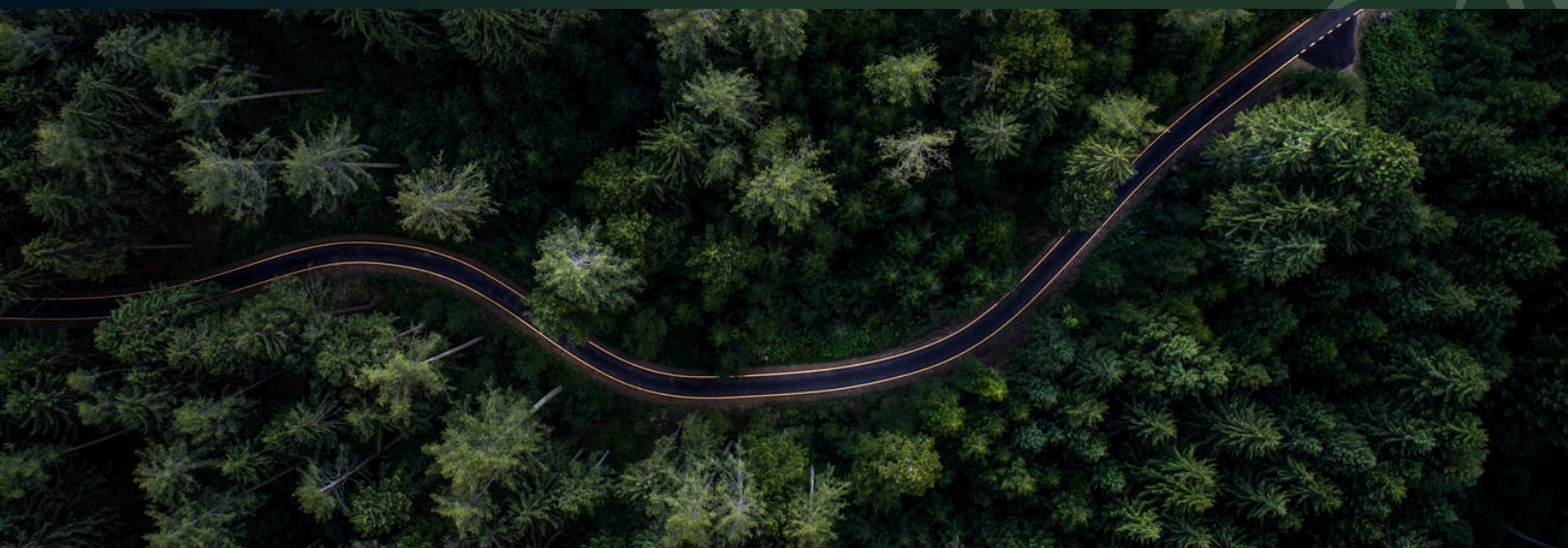
10% OF
COMMISSION
DONATED TO
A CHARITY OF
YOUR CHOICE

10 TREES
PLANTED PER
COMPLETED
MORTGAGE

FREE
MORTGAGE
ADVICE FOR
ALL OF YOUR
EMPLOYEES



SOCIAL & ENVIRONMENTAL IMPACT



Well Financial was born out of a passion for making a positive difference to our clients' lives and wellbeing.

Our partnership with Furthr has helped us extend this passion to become a climate positive business. We are committed to planting 150,000 trees by 2035 on behalf of our clients, hoping we can make a small difference for future generations.

These contributions help to restore healthy forest cover in Ankarafantsika, Madagascar.



We donate 10% of the commission we earn from mortgages arranged for your employees directly to a charity of your choice.

This allows your organisation to extend its social impact effortlessly, supporting causes that matter to your business and your people.

For every mortgage arranged through your organisation, We also plant 10 trees in partnership with Furthr, supporting global reforestation and sustainability initiatives.

Together, **we support your employees futures**, while investing in a better world.

Your life, better.



Ten
Trees

Every
Client

Every
Time

19,900

Trees planted so far

MORE THAN
MORTGAGE

Advice



The benefit goes
beyond financial support,
it reflects your organisation's
values.



A financial benefit
that *truly* matters

"Well Financial have been brilliant! As first time buyers, it is a daunting experience but Dan was so knowledgeable, trustworthy and honest with us at every stage of the process and made us feel at ease"

— Sophie - Google reveiew



"I was utterly amazed that within a few days of our meeting he'd been able to obtain an AIP for what I needed and applied for the mortgage. Making our dreams a reality. Thank you - Highly recommend"

— Annette - Trustpilot



"an easy to talk to person and made even the most complex topic very easy to understand."

— Matteo - Trustpilot



WHY Well FINANCIAL

Well Financial is a UK mortgage and insurance brokerage built on expertise, transparency, and long-term relationships.

We are known for:

- Clear, honest advice with no hidden costs
- Securing the best option from a panel of 100+ lenders
- Specialist knowledge in complex mortgage cases
- A calm, supportive approach from start to finish

EXPERTISE YOU CAN TRUST





ENHANCE YOUR EMPLOYEE BENEFITS PACKAGE TODAY

Offering free mortgage advice through Well Financial is simple to implement, cost-neutral for your business, and highly valued by employees.

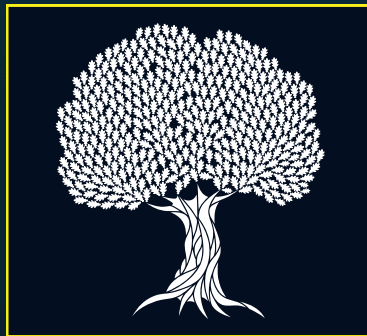
We will support you with:

- Exclusive access to a custom website unique to your business
- Clear employee communications
 - A simple referral process
 - Ongoing high-quality advice

Phone: 0800 0385 556

Email: hello@wellfinancial.co.uk

Website: www.wellfinancial.co.uk



Well Financial
Unit 15E Field House
Lancaster Way Business Park Airfield
Earls Colne, Colchester
CO6 2NS

FCA Authorised & Regulated

Well Financial Limited is an Appointed Representative of The Right Mortgage Limited, which is authorised and regulated by the Financial Conduct Authority. Registered in England and Wales no. 14517142.

Registered Address : Unit 15E Field House, Lancaster Way, Business Park Airfield, Earls Colne, Colchester CO6 2NS

Your Home (or property) may be repossessed if you do not keep up repayments on your mortgage or any other debts secured on it.

Some forms of Buy to Let mortgages are not regulated by the Financial Conduct Authority.

A fee may be charged for mortgage advice. The exact amount will depend on your circumstances.

The guidance and/or advice given is subject to the UK regulatory regime and is therefore targeted at consumers based in the UK.