

A background image of four business professionals (three women and one man) in a meeting, with a blue overlay. The text is centered over the image.

Amanda
Morral.

Workplace Financial Wellbeing

Helping employees build financial confidence for
today and financial independence for tomorrow



Financial Confidence at Work

Helping your people make
informed financial decisions
through practical, engaging and
independent financial education.

Amanda Morrall

Financial Educator | Author | Speaker

Why Financial Wellbeing Matters

Financial stress is one of the biggest sources of anxiety for working New Zealanders and can affect wellbeing, engagement and productivity.

When employees understand their finances, they are more likely to:



Feel confident about their financial future



Make informed KiwiSaver and investment decisions



Build healthy savings habits



Reduce financial stress



Prepare for retirement with confidence



Feel more engaged and focused at work



Financial wellbeing is increasingly recognized as an important component of a healthy, resilient workplace.

Why Amanda



Amanda Morrall is an independent financial educator, author and former financial journalist with more than 20 years' experience helping New Zealanders make smarter financial decisions.



She has delivered **dozens of workplace financial wellbeing seminars and workshops** for organisations including **Spark, Foodstuffs, Vitality Works, Mercury and Unimed**, helping employees better understand KiwiSaver, investing, retirement planning and long-term wealth creation.



Amanda is the author of Money Matters: Get Your Life & \$\$\$ Sorted and is known for translating complex financial concepts into practical, engaging advice that inspires action.

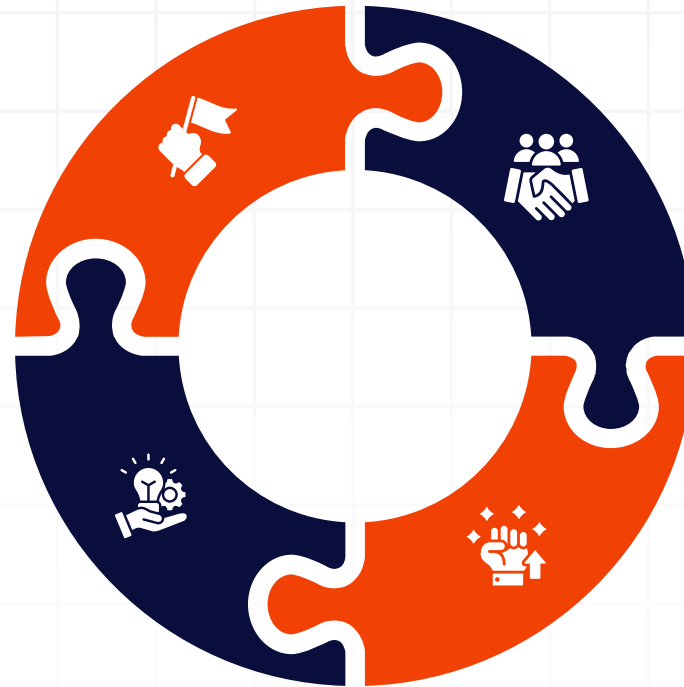
Why Amanda

Independent

Amanda is not aligned with any bank, KiwiSaver provider or investment company. Participants receive balanced, objective education without product recommendations or sales.

Practical

Complex financial concepts are explained in plain English using real-life New Zealand examples that employees can immediately relate to.



Engaging

Sessions are interactive, conversational and tailored to the audience, encouraging questions and practical discussion.

Empowering

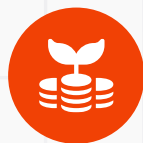
The goal is not simply to provide information—but to give people the confidence to make better financial decisions throughout their lives.

Workshop Topics



KiwiSaver Made Simple

- ▶ Choosing the right fund
- ▶ Understanding contribution rates
- ▶ Employer contributions
- ▶ Government incentives
- ▶ Fees and performance
- ▶ When and how to review your KiwiSaver



Investing with Confidence

- ▶ Shares, bonds and property
- ▶ Index investing explained
- ▶ Diversification
- ▶ The power of compound returns
- ▶ Common investing mistakes



Understanding Risk & Return

- ▶ Why risk matters
- ▶ Market ups and downs
- ▶ Matching investments to goals
- ▶ Long-term thinking versus short-term reactions



Building Financial Independence

- ▶ Creating long-term wealth
- ▶ Saving versus investing
- ▶ Retirement planning
- ▶ Financial habits that build freedom

Learning Outcomes

Participants leave with greater confidence to:



Workshop Formats

Lunch & Learn



▶ 60 minutes

A practical introduction to financial wellbeing and investing.

Interactive Workshop



▶ Half Day

Greater depth with case studies, discussion and practical exercises.

▶ Full Day Programme

Comprehensive financial wellbeing training tailored to your organisation.

▶ Ongoing Financial
Wellbeing Programme

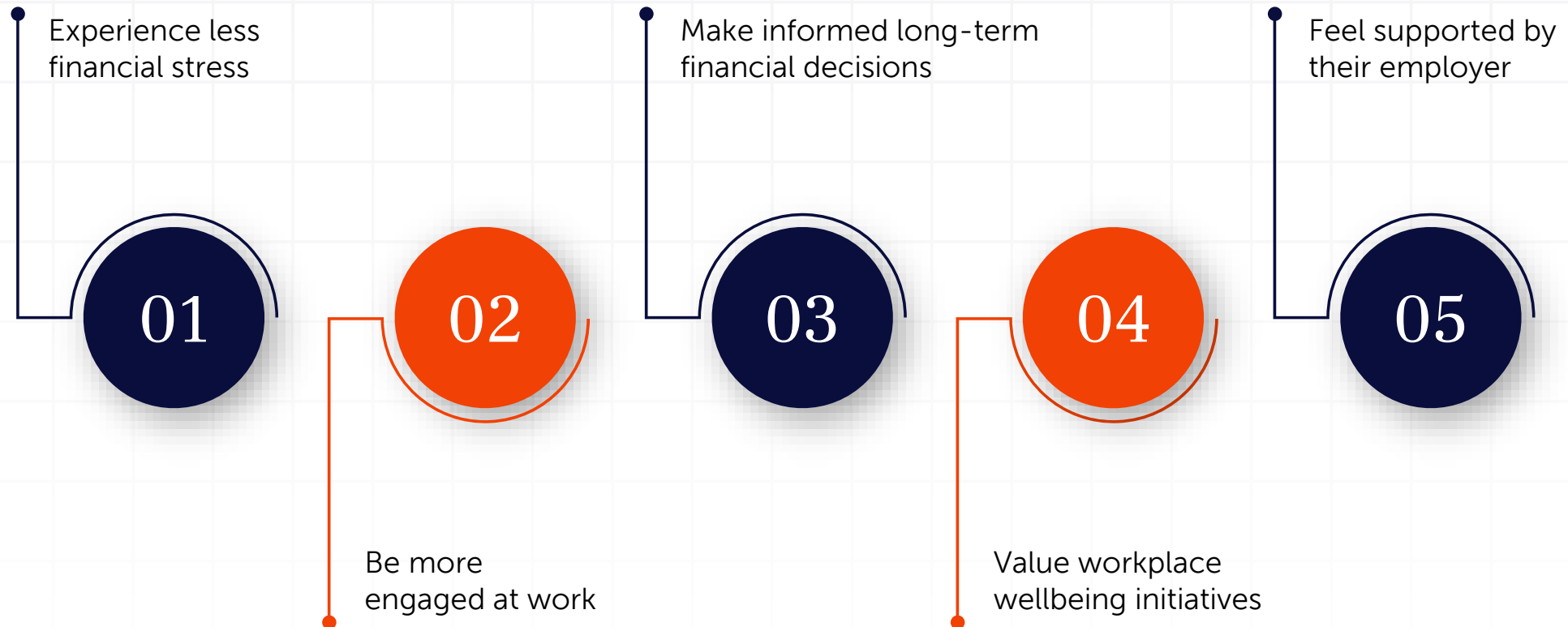
A series of workplace sessions covering different aspects of personal finance throughout the year.

Optional individual coaching sessions are also available.



Benefits for Employers

Financially confident employees are more likely to:



Investing in financial literacy contributes to a healthier, more resilient workforce.

Testimonials

“

What I love about this book is that while it gives you the nuts and bolts of financial planning and investing, it brings perspective and equilibrium to the pursuit of money. Amanda does a great job of blending finance, kindness, and well-being with practical advice and insight. Through engaging, real world stories and financial analysis, you'll gain a more balanced perspective on your fiscal future and investment goals while avoiding financial vampires. And yes, "debt and good should get a divorce.

Rashel Rey (Reader)

“

If you are lucky enough to engage with Amanda either in her capacity as a mentor or speaker you will find her to be open and straight forward. She has a knack for demystifying jargon, will get along side you or your team, creating plans and helping you achieve them. She comes with a creditable and strong background as an author, financial journalist and workshop creator.

Sheryl Sutherland (Financial Adviser and Author)

“

Amanda delivered an outstanding Money Month session for the Ministry of Social Development focused on financial wellbeing for families. From the outset, she connected warmly with participants and created a supportive, judgement-free space where everyone felt comfortable engaging. Amanda spoke with clarity and confidence, making complex financial topics easy to understand and genuinely relatable to family life. Her facilitation style was professional yet approachable, and she kept the session flowing smoothly while encouraging thoughtful discussion. The quality of Amanda's content was excellent, practical, well-structured, and grounded in real-world pressures families face. Participants came away with useful strategies they could apply right away, and her resources were clear and relevant.

Rick Broderson (Ministry of Social Development)

“

Amanda has been a guest on The Weekend Collective since its inception. Over the years that I have hosted the show, she has covered an enormous range of subjects — from KiwiSaver, investing and retirement planning to debt, spending habits, the cost of living and the psychology of how we deal with money. I've always been impressed by the depth and breadth of Amanda's knowledge, and her ability and willingness to tackle such a wide range of topics with ease. She's passionate about what she does, as well as being practical and good fun to work with. It's all part of the knack she has for making even the more complicated financial stuff interesting and easy to understand.

Tim Beveridge (Host, The Weekend Collective)
Newstalk ZB

Organisations Amanda Has Worked With

Amanda has delivered workplace financial education for organisations including:



FOODSTUFFS
NORTH ISLAND



UniMed

Newstalk
ZB
Regular Guest

What Makes These Sessions Different?

Participants consistently value
Amanda's sessions because they are:



Independent and unbiased



Practical rather than theoretical



Easy to understand



Highly engaging



Relevant to everyday financial decisions



Focused on building confidence—not selling products

Employees leave with knowledge they can immediately
apply to improve their financial wellbeing.





Amanda
Morrell.

Let's Build Financial Confidence Together

Empower your people with practical financial knowledge that lasts a lifetime.



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