

Our Vision

A future where people can achieve their best financial wellbeing

Our Purpose

We work with organisations and communities to ensure more people can make informed money decisions today, and are confident planning their financial future

Our Values

Integrity
Respect
Accountability
Collaboration

Our Approach

We invest in partnerships, programs and people to provide effective financial education at key life stages, and to improve community financial capability and wellbeing. Applying a systems approach to grant making, we evaluate and share the outcomes, insights and impact of our work.

What we are doing

Equip We provide financial education and capability initiatives in schools, workplaces and communities to address the national financial education gap and deliver money lessons for life.

Connect We connect people to resources and expertise to help build financial knowledge, confidence and capability in their communities. We collaborate with others to deliver accessible, scaleable initiatives.

Influence We work in alliances to share data, insights and approaches. We advocate for the crucial role of financial wellbeing in overall health, to influence policy settings and drive systems change.

Why we do this work

So that people can access effective information, programs, resources and support at key life stages.

So that our partners have the grant funding, capacity, resources and evaluation tools they need to support their financial capability work.

So that a coordinated national financial capability approach is adopted, addressing the need for education, support and guidance to strengthen the financial capability and wellbeing of Australians.

Outcomes we work towards

More people have the financial knowledge, confidence and capability to make informed financial decisions.

Integrating financial education and capability supports into grants, programs and outreach delivers better community financial wellbeing outcomes.

The positive impacts of building financial capability for people, communities and the economy are recognised and actively addressed.

Our Stakeholders

We work with communities, consumer organisations, schools, educators, government, sector peaks, researchers and employers.

