

FINANCIAL WELLBEING TIMELINE

THE BOOK

Ovation founder, Chris Budd released The Financial Wellbeing Book in 2016. The book guides readers to structure finances in a way that brings wellbeing.

2016

THE PODCAST

The Financial Wellbeing Podcast is 72 episodes strong and counting - exploring different ways we can 'know thyself' and use our finances to increase our overall wellbeing.

THE WORKSHOP

Chartered Financial Planner Tom Morris, presents the workshop in business workplaces to help employees use their finances and create plans based around increasing their happiness and wellbeing.

2017

2019

THE CONFERENCE

A fantastic event in 2019 that shared the message of financial wellbeing to fellow financial planners.

The conference led to further conversations about doing more to spread the idea that money can be a tool to bring happiness.

The Initiative for Financial Wellbeing

The IFW was created, with Ovation's Chris Budd and Tom Morris among the founding executive members.

The ongoing purpose of the IFW is to share good practice with anyone interested in financial wellbeing.

2020



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