MoneyTalks Stakeholder Referral Package

MoneyTalks.co.nz
0800 345 123
Your free financial helpline

Summary

MoneyTalks provides a quick and easy way to get in touch with trained Financial Mentors who can provide advice over the phone, through text, via our online chat and by email. MoneyTalks has a team of Financial Mentors who work with tens of thousands of New Zealanders a year. Our trained and experienced Financial Mentors provide advice and support, connect people with local budgeting services in their own communities, and help them take control of their finances.

MoneyTalks offers options for referrers such as banks and finance companies, debt collectors, utility providers, and government departments.

- Proactive referral form
- Cold call referral

The following outlines each of the above packages.

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Proactive Referral form

Proactive referrals involve the referrer providing the details of the person being referred to MoneyTalks to allow scheduled contact using MoneyTalk's online form. This option requires the referrer to seek explicit permission from the person being referred for their contact details to be shared with MoneyTalks along with an indication of a suitable contact time.

Example of online form and link for access below:

FinCap
Got it together

Home About Us The Team News Resources Campaigns Cont

MoneyTalks proactive referral form

Please fill in the following form on behalf of your customer. Submitted forms are sent directly to our financial mentors. We endeavour to respond to submissions w one working day.

Referred details

Name of person referring *

First Last

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Cold Referral

We encourage all referrers to include cold referral details in their communications to customers. However, conversion rates from cold referrals are difficult to trace. We suggest using cold referrals in addition to one the proactive referral form. This may include mentioning MoneyTalks website and free phone number at the bottom of your invoices, late payment communications or letters to customers.

Resources for referrers:

We've put together a kit including our logo, brand guidelines, and how to use our brand for use by businesses and other organisations who would like to offer their customers the opportunity to start the journey of taking control of their finances by talking with us.

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MoneyTalks Offers

Advice – Our Financial Mentors provide advice to people who are seeking free budgeting help or who are experiencing financial hardship, have found themselves financially vulnerable due to COVID-19, or need to make urgent decisions which impact their money.

Convenience – MoneyTalks can be a "one-stop shop" for customer referral if the customer would like free assistance with managing their finances, they can simply be transferred to 0800 345 123 and a Financial Mentor will take it from there.

Ongoing budgeting help – Our Financial Mentors also refer people to their local budgeting service where they will be offered ongoing free budgeting help while they work towards getting their finances back on track.

Our free MoneyTalks helpline listens and provides advice and support to anybody who wants help with their money. We share information, provide choices and connect people with local services such as foodbanks, health services, consumer rights and employment services. We help people to communicate with Work and Income, fill in Kiwisaver Hardship applications, find ways to save, or manage debt. We understand food is the immediate need, and it's much easier to korero and plan with a full tummy! Our Financial Mentors are knowledgeable and passionate about making a difference. They are there to coach and walk with the person on their journey.

The helpline operates between Monday to Friday 8am to 8pm, Saturday from 10am to 4pm and on Sunday 10am to 2pm.

You can contact MoneyTalks by:

- Calling: 0800 345 123
- Texting: 4029
- Emailing: help@moneytalks.co.nz
- Online chat at www.moneytalks.co.nz