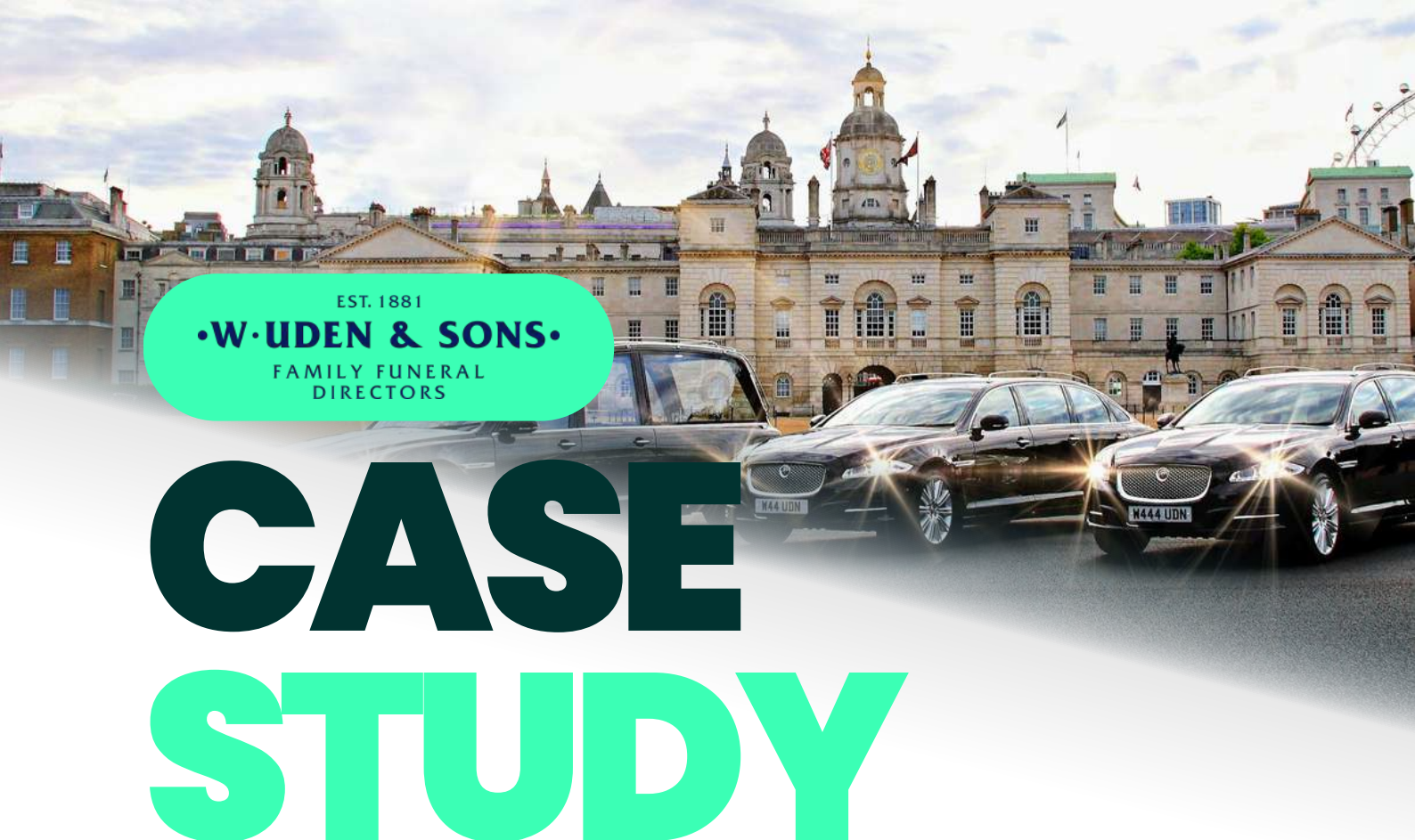




EST. 1881
•W•UDEN & SONS•
FAMILY FUNERAL
DIRECTORS

CASE STUDY

Company name: W. Uden & Sons Funeral Directors | **Company size:** 50-100 employees
Industry: Funeral Directors | **Location(s):** London & Kent

About:

W. Uden & Sons are a fifth-generation family-run funeral directors with branches across South East London and Kent.

The challenge:

As a paternal business, the company wanted to make sure they looked after their employees' physical and financial wellbeing with their employee benefits package. However, managing this in-house was an administrative burden on the growing business.

Uden & Sons had long-standing arrangements for their employee benefits and financial services - some of which were direct-to-provider agreements that hadn't been reviewed in years.

Our solution:

We delivered a fully integrated financial and employee benefits overhaul for Uden & Sons, starting with a more cost-effective private medical insurance scheme and expanding into bespoke business protection, pension restructuring, corporate cash management, and on-site health screenings.

By aligning each service with the company's culture and goals, we simplified their benefits offering, improved employee engagement, and helped the leadership team regain control of their financial planning.



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HOW WE HELPED



Health insurance

Uden & Sons had historically gone direct to a provider for their private healthcare. The scheme had become expensive, and there had been no recent review of pricing or suitability. We brokered a new PMI arrangement on their behalf, sourcing more competitive cover with a leading provider. The result was a significant reduction in premiums, improved benefits for employees, and no downtime in coverage during the switch.



Protection

Following the success of the healthcare review, the leadership team asked us to look into their protection for key personnel. We designed a bespoke set of relevant life policies, shareholder protection, and serious illness cover tailored to their needs as a family business. This helped ensure that senior management and key individuals, as well as the business were properly protected against all eventualities.



Pensions & corporate wealth

The company also wanted to help their employees look after their financial wellbeing through their pension scheme. Saving for retirement and engagement with their previous pension scheme were low. We helped move their workplace pension to Smart Pension, a leading provider known for accessibility and digital engagement to help members save.

For directors and senior managers, we arranged managed self-invested personal pensions (SIPPs) via our investment team. Our team created bespoke plans that aligned their investments with their long-term financial goals.

We also began managing and investing some of the business's surplus cash, implementing a corporate cash management plan to ensure its working capital was earning appropriate returns while remaining accessible.



Health screening

Wellbeing is central to Uden & Sons' values. And with a comprehensive PMI policy in place for their employees, we arranged a full on-site health screening service for their employees, delivering personalised checks through a mobile clinic. This initiative helps identify early-stage health concerns, engaged staff in their wellbeing, and connected seamlessly with their protection benefits.



Willu Wallet

To tie everything together, we rolled out the Willu Wallet app to all staff. This gave employees instant access to their benefits, pensions, insurance, and financial tools in one place - empowering them to take control of their finances while boosting engagement with everything the company provides.

“WillU helped us take a step back and modernise how we support our team - from healthcare and pensions to wellbeing and insurance. We’ve saved time and money, but more importantly, we’ve introduced benefits that truly reflect our values as a family business. The rollout of WillU Wallet has been the cherry on top - it’s brought everything together for our staff.”

Managing Director
W. Uden & Sons

“At WillU, we take pride in helping family-run businesses protect what matters most. With Uden & Sons, we were able to reduce unnecessary healthcare costs, introduce tailored protection for their leadership team, and modernise their pensions and cash strategy. Through tools like WillU Wallet and on-site health screening, we’ve helped them deliver a joined-up physical and financial wellbeing experience for their people.”

Craig Copeland
Group CEO, WillU

