

PREPARE TODAY

ENJOY TOMORROW

53%

Of employees are stressed about their finances

Source: 2017 PWC Financial Wellness Survey

Financial Wellness means understanding one's financial situation and being prepared for financial changes

Our **Financial Wellness** program can help your employees become financially prepared, and hopefully reduce some of that financial stress

GROUP MEETINGS

Through group meetings, your employees will gain an appreciation of the financial fundamentals, surrounded by their peers in a safe environment

General Sessions

- Understanding your Financial Agility
- Developing a Savings Plan

Pre-retiree Sessions (within 5 years of retirement)

- Creating a Retirement Income Stream
- Retirement: Employer Benefits, Social Security, & Medicare

Following group sessions, individuals may meet with us one-on-one to dive deeper into relevant and personalized financial content. These meetings provide a stepping stone to comprehensive financial planning, including the development of retirement and investment strategies

INDIVIDUAL ON-SITE MEETINGS

PERSONALIZED REPORTING

Retirement Readiness Statements

An annual statement measuring each employee's progress towards retirement

Total Rewards Statements

An annual statement illustrating the financial value you deliver to your employees

On-Demand Financial Agility Tool

A tool with which employees can understand and gauge their own Financial Agility

Deliver Total Reward Statements

JAN	FEB	MAR	APR
MAY	JUN	JUL	AUG
SEP	OCT	NOV	DEC

Deliver Retirement Readiness Statements

Group & Individual Meetings

FINANCIAL WELLNESS BY

