



# Maximize Engagement By Integrating Financial Wellness

Financial wellness matters to employees. Studies show that **4 of 5 employees** report wanting personalized financial support from their employer and **90% of employees** say that financial benefits that target their individual needs would help them to feel more invested at work. Financial wellness isn't just a "nice to have" employee benefit, it's a critical component of your recruiting, retention, wellness and training strategy.



## One-Stop Shop For Personalized Financial Wellness

You work hard to build a benefits package that supports your employees in times of need and for the long-term. You want to ensure employees are getting the most from your benefits, but there are some topics like personal finances that you're not qualified to address.

- ✓ Collect valuable information about what your employees need help with, regardless of location or shift.
- ✓ Target personal financial training and support to your employees at the times they need it most.
- ✓ One location for all things benefits by logging in
- ✓ A robust financial wellness program means less work for your HR team.
- ✓ Employees get personalized, year-round education and engagement.
- ✓ Valuable insights for HR uncovers gaps in current benefit offerings.

## INDIVIDUALIZED EMPLOYEE ASSESSMENT



VOLUNTARILY  
COMPLETED THE TOOL



DIRECTLY BOOKED  
A MEETING



BOOKED A MEETING AFTER  
RECEIVING TAILORED  
EDUCATION CONTENT

## How It Works

The process for employees is simple. And an easy process for employees means a great experience.

### Personal scorecard

Employees complete a 3 – 5 minute assessment . The software analyzes and employee's unique financial situation and immediately gives them a personalized financial wellness score with a simple red, yellow, green rating.

### Opportunity to book a private appointment

From there, employees have the opportunity to book a complimentary meeting with a personal financial planner where they get one-on-one support.

### Different interventions based on needs

The system automatically sets users up with the right financial planner based on the needs identified in their assessment.

### Smart education keeps employees engaged year-round

Employees receive on-going, year-round education and support that fills in gaps, drives engagement with your benefits package, and delivers the personalized guidance they need for financial security.

## Getting Started Is Easy

Personal finances are one of the biggest stressors facing your employees today. With the global pandemic still smoldering and inflation soaring, your employees are losing sleep and productivity worrying about and dealing with financial struggles.

Get in touch today to see how quickly and easily you can support your employees.

## IN THEIR WORDS

“This is such an important benefit. I went through the full planning process. It was everything you said it would be. *The quality, attention to detail helped me make very important decisions* in my life that I would never have been able to do without the advisory support. It truly changed my life.”

EMPLOYEE