



# PATHWISE GROUP

BUILT TO SUPPORT  
TRADITIONAL BENEFIT  
CONSULTANTS

## CONSULTANT PACKET

# PATHWISE GROUP DIFFERENCE

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Helping you individualize  
the worksite

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TO PROVIDE A SUITE OF SERVICES THAT  
SUPPORT THE CURRENT BENEFIT OFFERINGS  
WITHIN YOUR GROUPS AND ENHANCE THE  
OVERALL PACKAGE PROVIDED TO  
EMPLOYEES



# OPPORTUNITIES



**Revenue Generating Opportunities On Existing and New Business**



**Year-Round Financial Wellness Engagement**



**Audit Capabilities  
(Executive Benefits & Retirement Plan)**



**Access to Individual Financial Planners**



**Data and Analytics to Support Group Offerings**



**Voluntary Benefits to Fill Gaps (Long Term Care, Disability & Life Insurance)**



**Benefit Administration Integrations Platform  
(Financial Wellness Tool & Voluntary Benefits)**



**Recruitment, Retain & Reward Employees**



**Off Open-Enrollment Opportunities**

# SUITE OF SERVICES

BRINGING INDIVIDUAL ATTENTION  
TO EACH EMPLOYEE



## FINANCIAL WELLNESS

Leveraging technology with a human approach to improve financial wellness.



## EXECUTIVE LEVEL BENEFITS

Building benefit options that recruit, retain and reward your highly compensated employees.



## BENEFIT ADMINISTRATION SYSTEM

Integration for a seamless approach.



## INDIVIDUAL ADVISORY SERVICES

Creating tailored solutions for individuals in any life stage.



## DATA & ANALYTICS

Using worksite specific data to make informed decisions.



## RETIREMENT PLAN CONSULTING

Establish an efficient and effective retirement plan.



# SCOPE OF SERVICES

## INDIVIDUAL ADVISORY SERVICES

SOLUTION BASED PLANNING

FINANCIAL PLANNING

EMPLOYEE/ADVISOR APPOINTMENTS NOT LIMITED

REVIEW 5 KEY AREAS (INCOME, INVESTMENT, TAX, HEALTHCARE, LEGACY & ESTATE)

SUPPORT VOLUNTARY BENEFITS

SUPPORT ALL LEVELS OF EMPLOYEES

SUPPORT OFFERED DURING AND OFF ENROLLMENT (YEAR ROUND)

SUPPORT FOR NEW EMPLOYEE ONBOARDING

SUPPORT QUALIFYING EVENTS

SUPPORT TRANSITION TO RETIREMENT

SUPPORT STUDENT LOAN INITIATIVES

## BENEFIT ADMINISTRATION SYSTEM

INTEGRATION CAPABILITIES FOR VOLUNTARY BENEFITS

INTEGRATION CAPABILITIES FOR FINANCIAL WELLNESS TOOL

QUALIFYING EVENT COMMUNICATIONS

## FINANCIAL WELLNESS PLATFORM

INDIVIDUALIZED EMPLOYEE ASSESSMENT

TAILORED INDIVIDUAL EDUCATION CAMPAIGNS YEAR ROUND

MATCH LEVEL OF SUPPORT TO NEEDS OF EACH EMPLOYEE (SOLUTION VS FULL PLANNING)

YEAR-ROUND ACCESS TO FINANCIAL PROFESSIONALS

GROUP LEVEL EDUCATION DELIVERED BY FINANCIAL PROFESSIONALS

PERSONAL FINANCIAL DASHBOARD AVAILABLE TO ALL EMPLOYEES

CUSTOMIZED ON DEMAND E-LIBRARY AVAILABLE TO ALL EMPLOYEES

INDIVIDUALIZED EMPLOYEE ASSESSMENT

GROUP LEVEL DATA FOR CONSULTANT TO IDENTIFY NEW OPPORTUNITIES

ON AND OFF OPEN ENROLLMENT LAUNCHES

## EXECUTIVE LEVEL OFFERINGS

TAILORED BENEFIT PACKAGE FOR HIGH INCOME EARNING EMPLOYEES

VOLUNTARY BENEFIT OPTIONS TO SUPPORT EMPLOYEE NEEDS

ACCESS TO FINANCIAL PLANNING (FIDUCIARY)

HOLISTIC PLANNING TO ADDRESS FULL EMPLOYEE PORTFOLIO (INCOME PLANNING, TAX PLANNING, INVESTMENT PLANNING, HEALTHCARE PLANNING, ESTATE & LEGACY PLANNING)

AUDIT CAPABILITIES ON EXECUTIVE BENEFIT STRATEGY WITH RESULTS BEFORE COMMITMENT

RETIREMENT PLAN SUPPORT

AUDIT CAPABILITIES ON RETIREMENT PLAN WITH RESULTS BEFORE COMMITMENT

FINANCIAL ADVISORS TO SUPPORT OVERALL BENEFIT PACKAGE INCLUDING RETIREMENT PLAN

HOLISTIC PLANNING FOR EMPLOYEES (INCOME PLANNING, INVESTMENT PLANNING, TAX PLANNING, HEALTHCARE PLANNING, LEGACY & ESTATE PLANNING)

INVESTMENT PLAN COORDINATION AND EFFICIENCY (401K, 403b, DEFERRED COMPENSATION PLANS)

DATA AND ANALYTICS

ALLOW FOR OVERALL GROUP ASSESSMENT

ALLOW FOR MULTI-SITE BREAKDOWN

TRACKING EMPLOYEE ENGAGEMENT

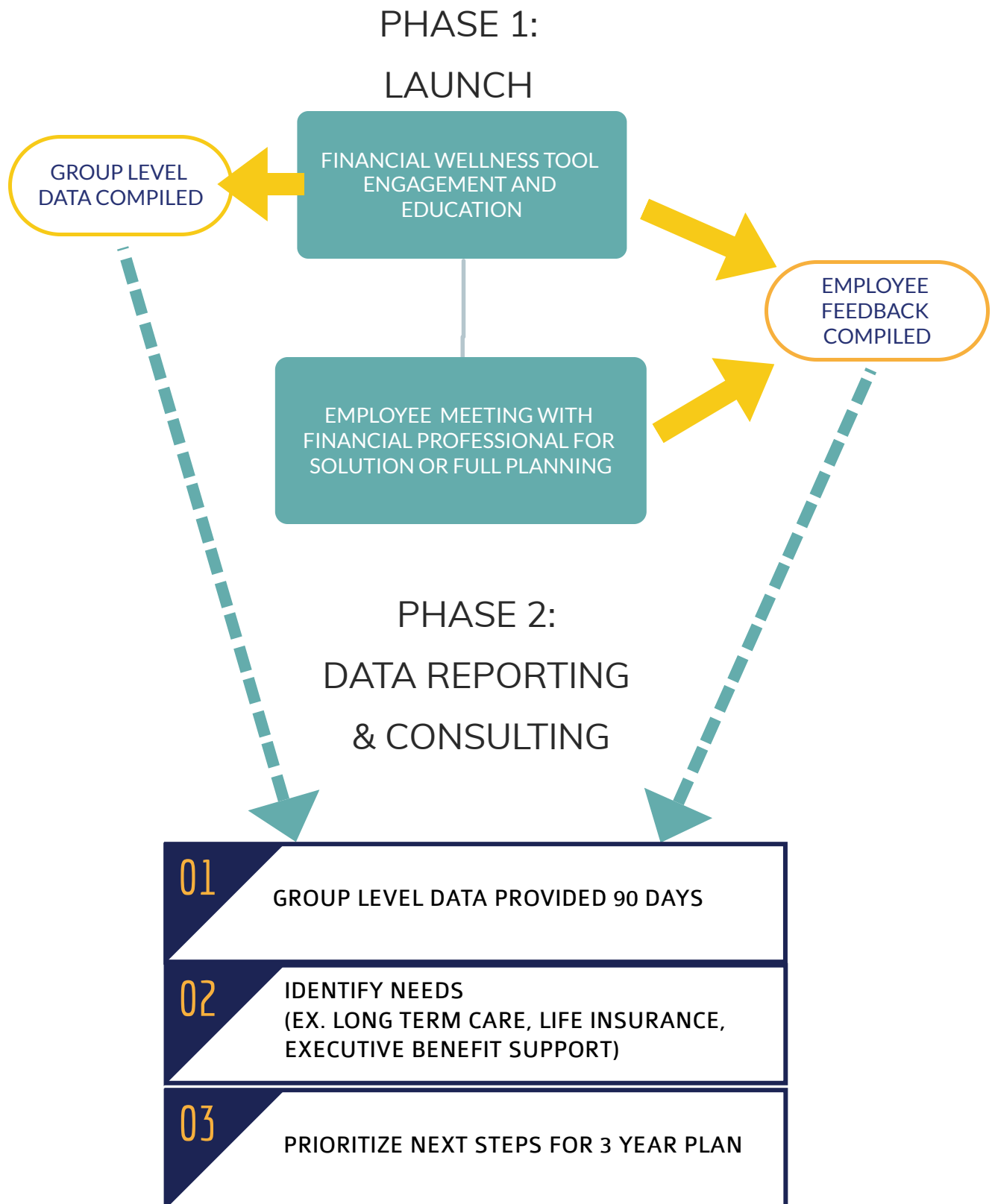
TRACKING EMPLOYEE SATISFACTION

TRENDING FINANCIAL WELL BEING SCORES

DISCOVERY OF NEW OPPORTUNITIES FOR CONSULTANT

# TRANSFORMATIONAL ANALYTICS

DATA DRIVES OPPORTUNITIES & RESULTS





# TO LEARN MORE



#1



ENGAGE LEAD  
CONSULTANT

IDENTITY NEEDS  
PRIORITIZE NEEDS



#2



PATHWISE DEMO

REVIEW SERVICE(S) OF INTEREST



#3



REQUEST FOR  
PROPOSAL

IDENTIFY OPPORTUNITIES  
& NEXT STEPS



#4



JOINT MEETING WITH HR  
LEAD

TIMELINES AVAILABLE  
MARKETING MATERIALS FOR HR  
MARKETING MATERIALS FOR EMPLOYEES