

# CONSULTANT PACKET

Built to Support Traditional  
Benefit Packages



**PATHWISE**  
GROUP

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## Helping you individualize the worksite

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To provide financial wellness 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**



**Individual 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 CONSULTATION

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) & TAX EXPERTS

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

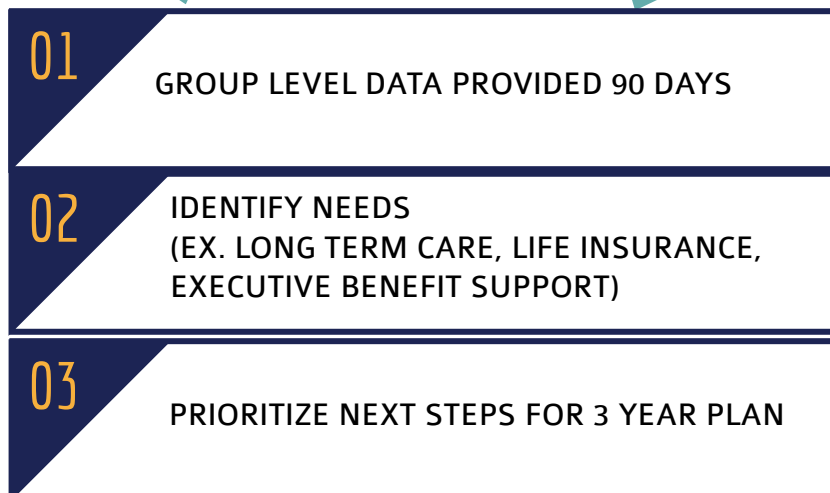
# TRANSFORMATIONAL ANALYTICS

DATA DRIVES OPPORTUNITIES & RESULTS

## PHASE 1: LAUNCH



## PHASE 2: DATA REPORTING & CONSULTING





# TO LEARN MORE



#1

ENGAGE LEAD  
CONSULTANT

IDENTIFY 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