EMPLOYEE FAQ

Your questions, answered

Does this cost me anything?

No. Your financial wellness benefit is provided by your employer at no cost to you.

Is it confidential?

Yes. Your employer does not see your individual answers or what you discuss.

Do I have to buy anything?

No. You are never required to purchase anything. If an advisor sees a gap, they may suggest options for you to consider.

How long is the assessment?

About 3–5 minutes. You'll see your personal financial wellness score right away.

How long is the first meeting?

45 minutes, by video or phone, at a time that suits you.

What if I'm not ready to meet?

That's fine. You'll receive tailored education and can book whenever you like. You can opt out at any time.

Can my spouse or family use it?

Yes. All family members can use the benefit.

Is it only for retirement?

No. Get help with budgeting, debt, student loans, taxes, insurance, investing and estate planning too.

When can I use it?

Year-round, not just at open enrollment, including when life changes.

Who will I talk to?

A Pathwise concierge or financial professional matched to your needs, plus specialists when needed.

MORE ANSWERS

Getting the most from your benefit

What should I bring to my meeting?

Your questions. If handy: a pay stub and retirement or investment statements.

Will I get a financial plan?

If you'd like one. Some people need help with one question; others want a full plan.

What happens after my first meeting?

You'll receive a follow-up email with next steps, and can book a follow-up meeting.

Where do I find webinars?

On the Pathwise employee hub: **pathwisegroup.com/employees**

What if I leave the company?

If you're working with a Pathwise advisor when you leave, you can keep working with that advisor.

Who do I contact with questions?

Email **info@pathwisegroup.com**.

Start with a 3–5 minute check-in

Take your assessment, then book a time that works for you.

Take the assessment