PATHWISE GROUP

FOR EMPLOYEES

AN EMPLOYEE BENEFIT

Your financial wellness benefit is here

Personal, confidential financial guidance from real people, at no cost to you. Available year-round.

1

Take your assessment

About 3–5 minutes online. You get your personal financial wellness score right away.

2

Book a conversation

Choose a time for a complimentary 1:1 meeting by video or phone.

3

Make a plan

Leave with clear next steps, and come back whenever life changes.

Get help with

- Retirement planning
- Investment planning
- Tax planning
- Estate planning
- Risk management & insurance
- Debt management
- Student loan relief
- Understanding your benefits

SCAN TO GET STARTED

Your future self will thank you.

Take the assessment: **sagefinancialwellnesstool.com**
Book a conversation: **calendly.com/pathwise-concierge-team**
Questions? **info@pathwisegroup.com**