Workplace Financial Wellness

Help employees take a healthy approach to money matters

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1 EBRI, 2015 Retirement Confidence Survey
2 Employee Financial Wellness Survey, PwC, 2017

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Let’s connect.
Want to learn more about how Workplace Financial Wellness can benefit your business? Contact us today.

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A win for employees. A win for you.

What is Workplace Financial Wellness?

Many employees worry about their finances, and they may not fully understand the value of their benefits package. This can result in problems with employee retention, productivity, and other issues.

What can you do about it? That's where Workplace Financial Wellness comes in. The program is:

- A personalized financial education benefit for employees.
- A valuable addition to your benefits package.
- A service offered with no out-of-pocket costs to you or employees.

How do I benefit?

Regardless of the size of your business or the type of benefits you provide, Workplace Financial Wellness offers several advantages, including:

- Employees gain a better appreciation and understanding of the benefits you provide.
- Potential for improved employee morale and retention.
- Workplace productivity may increase as employees are less distracted by financial concerns.
- Offering financial advice to employees becomes less of a burden.
- You get all of this without increasing your benefits cost.

How does it work?

We can tailor the program to meet the needs and preferences of you and your employees, using:

- Group meetings where we reinforce the value of employees' existing benefits and introduce the Workplace Financial Wellness program.
- Individual meetings with employees in which we provide:
  - A review of life and disability insurance needs. We help employees understand why protecting against the unexpected is key to a sound financial strategy.
  - A comprehensive financial needs analysis. This includes education about the benefits you provide, Social Security and other government plans, integrating personal planning and employee benefits, and how employees can reach their financial goals.

Nearly 2/3 of workers say they feel behind schedule when it comes to planning and saving for retirement.¹

Nearly 1 in 3 employees reports that issues with personal finances have been a distraction at work.²