

FINANCIAL WELLNESS SERVICES OVERVIEW



ARE YOUR EMPLOYEES EDUCATED ABOUT THEIR FINANCIAL WELL-BEING?

- We have a variety of self-serve employee education materials, available from your client portal, including retirement benefits, wellness information and money-saving tips.

DO YOU HAVE THE TOOLS TO HELP EMPLOYEES MAKE WISE FINANCIAL DECISIONS?

- When employees are worrying about financial concerns, their work will undoubtedly be affected. We offer you tips and strategies to help employees avoid, manage and cope with financial hardships.

DO YOU HAVE QUESTIONS ABOUT OFFERING RETIREMENT PLANNING BENEFITS?

- Stay ahead of the game with our Plan Sponsor series. This series walks you through offering retirement benefits, and includes articles on how to establish different types of plans, checklists and to-do lists.

EMPLOYER EDUCATION

The Benefits Insights and HR Insights series serve as a reliable resource for all types of benefits and HR-related topics and provide you with answers when you have questions. Access articles specifically related to helping employees improve their financial well-being to educate yourself on the topic.

PLAN DESIGN AND PLAN SPONSOR SERIES

Uncover the details of various plan designs and plan sponsor responsibilities with a detailed articles.

FINANCIAL WELLNESS SERIES

Give your employees articles from the Financial Wellness series to help them become educated on how to enhance their financial wellness.

EMPLOYEE COMMUNICATIONS

Use customizable announcements and summaries to provide employees with the educational materials they need to improve their financial wellness.

CONSUMERISM MATERIALS

Medical debt is the leading cause of bankruptcy in the United States. Help your employees avoid expensive medical costs by giving them the tools to help them make wiser health care decisions.

