

## Key Employee/ Executive Resources

There is a connection between being **financially confident** and being **financially well**. That's why education is a cornerstone of our financial wellness approach.

**Time is valuable.** Workshops are not for everyone. As successful professionals, your key employees may have financial challenges that are more unique. As their careers, families, and wealth grow, **life can become far more complex.**

### Challenges your key employees face may include:

- Scattered assets
- Uncoordinated financial products
- Overpayment of taxes
- Limited awareness of financial hazards
- Lack of organization of valuable documents
- Misalignment of personal and corporate plans/benefits
- Lack of understanding of tax issues and managing stock options
- Limited knowledge of corporate benefits and their value
- Insufficient risk management and protection planning
- Unclear retirement, charitable giving, education funding, and estate planning strategies



That's why we have created **an approach especially for them**. It offers 1:1 education that applies directly to their situation. In addition, personalized consultation from a dedicated financial professional can help them navigate their path to financial wellness and **realize the potential of all their hard work.**

### Benefits to the key employee/ executive may include:

- + An objective, comprehensive picture of their current financial position
- + Insights into how employer-offered benefits enhance and integrate with their overall financial position
- + Clearly articulated financial goals
- + Identification of any gaps in their current plans and ways to close them
- + A holistic and enhanced approach that pulls it all together

We educate to build **financial confidence** and **encourage action** that can help support the path to **financial wellness.**

**It's time to start  
thinking differently.**