

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.**