

Inform

We connect the dots by educating associates about integrating existing employer-offered benefits into their overall financial picture.

The benefits you offer can play a big role in building employee engagement, job satisfaction, and loyalty.

However, the connection between employer-offered benefits and their role in financial wellness is often overlooked.



Do your employees know what is included in their benefits package? More importantly, do they see it as an integral piece of their financial wellness solution?

Retirement:

What is their retirement readiness?

Investing:

Do they feel confident making sound investment options?

Legal and other services:

Are the basics of estate planning, such as wills, healthcare proxies, and powers of attorney, in place?

Protection:

Do they know their options for protecting against unexpected expenses?

After retirement:

Do they know what benefits continue after retirement?

We engage with your associates to inform and encourage action by:

- ✓ Putting it all together
- ✓ Integrating the benefits you offer into their full financial picture
- ✓ Providing knowledge that can help build their financial confidence
- ✓ Pointing to resources that can help

Seeing the full picture can help individuals develop a holistic plan that encompasses their lifetime and legacy objectives.

It's time to start thinking differently.