

About Planwell™

Description

Our mission is a simple one. To engage employees with the real-world financial knowledge and confidence they need to make their goals attainable. More than simply retirement planning, PlanWell™ is a compelling, jargon-free education curriculum from Baystate Financial, created to instill a lifetime of financial preparedness.

There's never been a better time to help your employees work towards a brighter future. Bring PlanWell™ to your organization and build a more satisfied, focused workforce.

[Get Started](#)

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Not all financial education is created equal

PlanWell™ is a financial education curriculum from Baystate Financial designed to help human resources departments bring financial well-being to their workplace. It's not a generalized, basic program for all. Rather, it delivers a unique, individualized financial experience to each employee. One that allows them to immediately adapt the lessons they learn to their lives.

The objective? To help your employees realize their financial goals, whether it's saving for a house, college, or retirement in a product-agnostic environment.

The best part? We take care of the necessary planning, marketing, and communications to make the curriculum successful.

How PlanWell™ addresses the needs of the employee and benefits the employer:

Our curriculum is designed to empower employees with financial knowledge to give them confidence to achieve their personal goals. Together with your existing benefits offerings, the curriculum allows your employees access to objective information designed for the unique phases of their career. Additionally, it is delivered by financial professionals at no cost to you or your company.

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By integrating PlanWell with your current benefits package, you can:

- Improve financial literacy by providing your employees with resources to develop a financial roadmap
- Increase employee engagement, retention, and recruitment
- Foster a healthy financial culture and a more holistic approach to financial education

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Together, let's build a more satisfied, confident workforce by bringing PlanWell™

to your organization.

[Let's Talk](#)

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