Get Started

Description

Three Paths To
Employee Financial Well-Being

To be successful, an employee well-being program needs to be as varied as your workforce. That's why we offer three paths to implementing PlanWell™ at your organization — customized to your needs.

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Implementing PlanWell™

The Today Through Retirement™ Series

Our signature Employee Financial Education series provides an in-depth curriculum to those seeking the fundamentals of personal finance. This four-part series covers topics that range from saving and budgeting, all the way through retiring from the workforce, and post-employment life. It's designed to work in tandem with your benefits, acting to bolster your workplace wellness efforts and educate your employees on how these fit into their personal financial picture.

- Consists of four parts:
- Save
- Invest
- Live
- Protect

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The Milestone Series

Designed for a range of ages and knowledge levels, this approach highlights your employees' milestones, and focuses on need-to-know topics segmented by life stages. These curated courses dig deeper into concepts that include, but aren't limited to, getting married, buying an investment property, understanding social security and creating reliable income during retirement. The best part? They're based on the interests of your employees—in fact, your employees choose their own syllabus. Once they complete our pre-engagement survey, we learn their interests and use that understanding to develop the program that's most relevant.

Build

Geared towards:

- Young professionals
- Newlyweds
- People with young families
- Those looking for guidance with a financial plan

Sustain

Best suited for those:

- Approaching retirement
- Becoming empty nesters
- Caring for aging parents
- Looking for advanced ideas in the areas of investments and asset protection

Preserve

Covers:

- Advanced estate planning
- Creating reliable income during retirement
- Leveraging assets to create generational wealth
- Medicare and Medicaid
- Risks in retirement

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Workshops By Topic

Not certain where to start, or what to do once your initial series wraps up? With PlanWell™, you're covered. Our topic-based presentations can act as a great one-off engagement, as an introduction to our PlanWell™ series, or a continuation of it. Our workshops are tailored specifically to your company—to not just add value to your employee benefits offering, but to enhance it. Choose from our list of over 45 topics to create an ongoing culture of curiosity at your company, or curate your own multi-part educational series. With this adaptive model, the choice is yours.

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How the PlanWell™ Series works for you and your employees:

Our workshops are tailored to the company and their unique needs.

Attendees utilize the PlanWell™ workbook for their future financial roadmap.

Engagements and consultations that help to minimize the stress of financial worries.

Engagements are held virtually or in person at times and locations which work best for your team.

Employee meetings with our financial professionals, if desired, for holistic advice and strategies to help crystalize their financial goals.

Schedule a call with us today!

Let's Talk
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