The Planwell™ Curriculum

Description

Not all financial education is created equal. Unlike other offerings, PlanWell™ is designed to grow with the individual on a personalized level.

It's a step-by-step employee experience that serves as a guide to a lifetime financial journey. Together with your existing benefit offerings, these sessions give your employees objective information on how to identify and work towards achieving their financial goals. The curriculum is comprised of customized workshops, classes, webinars, and personalized professional guidance. Subjects range from college financing to retirement planning.

Get Started
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The Today Through Retirement Series™

LIVE Well

Understanding how to put savings to work

Session 3 continues the ?PlanWell™? Series with a look at how to utilize your assets to prepare for the uncertainties of life after work. With the right strategies, employees can help to ensure that regardless of outside conditions, they keep improving the chances of their own successful future.

Key Learnings:

- Identify guaranteed income sources that can be counted on during retirement
- Review the current state of your nest egg and how it is invested
- Learn to take on an appropriate level of risk
- Be more strategic with investments
- Understand the differences between reliable and unreliable sources of income in retirement

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PlanWell™ Workshops by Topic

Budgeting

- Creating a Budget
- Becoming Financially Independent
- Financial Goal Setting
- Financial Wellness Overview
- Managing Student Debt
- Family Money Skills: Saving Up for Ages 5-8
- Family Money Skills: Goal Setting for Ages 9-12
- Finance 101

Investing

- Common Money Mistakes
- Planning for College
- Roth Conversions. Are They Right for You?
- Asset Allocation
- Investment Basics
- Personal Risk Profile
- Taking Control of Debt

Retirement Planning

- Envision Your Successful Retirement
- Estate Planning 101

- Planning for Retirement
- Predictable Income in Retirement
- Retirement Risks
- Sources of Retirement Income
- Understanding Social Security
- Retirement Income: Now + Later Strategy
- The Social Side of Retirement
- Who is Guarding your Retirement?

Business Planning

- Employee Financial Wellness Strategy
- Simple Steps for Exiting Your Business
- Business Succession Planning
- Understanding the Value of Your Business
- Actionable Ideas for Business Owners

Insuring: Life + Income

- Health Savings Accounts
- Protecting Your Income
- Understanding Life Insurance
- Disabled? Me? Never
- Protecting What Matters Most

Advanced Curriculum

- Understanding Your Stock Benefits
- Exit Planning for Executive Management
- Retirement Planning for Executive Management
- Advanced Estate Planning
- Creating Reliable Income During Retirement

And more…

- Women and Finances
- Military Families
- Helping You Make a Difference: Charitable Giving

Want more information about our workshops?
View our course catalog

Course Catalog
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