Home

Description

The financial education curriculum that benefits employees & employers alike.

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PlanWell™ is a financial education curriculum designed to help human resources departments bring financial well-being to their workplace. It provides a one-on-one, personalized employee financial experience through customized workshops, classes, webinars, and professional guidance.

The time is right for PlanWell™.

Nearly half of American employees worry about their personal finances. While 77% of Americans say their financial health also affects their physical and mental health.* They're looking for guidance that you may not have the time or resources to provide.

*Guiding Americans On their Financial Journeys, Empower Institute, Oct. 2021.

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The benefit employees want

Eight out of 10 employees rely on their employers to deliver sound advice on financial planning, saving, and investing. PlanWell™ is financial guidance designed to grow with the individual throughout every stage of their financial journey.

It boosts productivity

When employees aren't distracted by financial worries, they concentrate more on work. PlanWell™ can not only increase employee productivity by addressing financial goals, it can help boost overall mental, emotional and physical well-being.

It's not a one-size-fits-all benefit

Not all financial guidance is created equal. PlanWell™ isn't a digital program or an app. It puts the human into HR financial guidance by focusing on who and what you want to focus on—your people.

It’s a long-term employee experience

PlanWell™ isn’t measured by the day, the week, or even the year. It’s a long-term financial journey that addresses life’s major events and helps employees understand how to save, invest and protect their wealth on the path to retirement.

It’s easy

We provide all the necessary planning, marketing, and communications to host an onsite or virtual engagement series for your employees. From introductions, session invites, and registration, to take home resources. We cover it so you don’t have to.

It’s a no cost benefit to you

Not only do we handle the details, but we invest in your people and don’t expect you to invest in us. Since we have no funds, no stocks, and no name brand investment platforms, we also have no bias. We’re motivated solely by doing what’s best for you and your employees.

“An investment in knowledge pays the best interest” – Benjamin Franklin

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Why Employee Financial Education?

You strive to offer employees great benefits. But something you may not be considering is how those benefits fit into an employee’s overall financial picture. Today, eight out of 10 employees say that personal finances are their top stressor—at home and at work. It’s understandable. In school, we aren’t taught fundamental financial principals like saving, investing, and diversifying assets. And now we’re seeing the long-term effect: 79% of employees rely on their employers to deliver sound advice on financial planning, saving, and investing.

The solution? PlanWell™.

Learn More

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The PlanWell™ Employee Financial Experience™

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PlanWell™ is an educational curriculum created to support HR departments and help employees realize their financial goals. Not an app, or a one-size fits-all offering, it's financial guidance with a difference. PlanWell™ delivers a unique, individualized financial experience to each employee. One that allows them to immediately adapt the lessons they learn to their own financial journeys—whether it's buying a house or saving for college and retirement. It consists of turnkey onsite and virtual engagements delivered by specially trained professionals at no cost to you or your team. And PlanWell™ staff works with you to easily implement the program.

Learn More

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Talk to our team about bringing a personalized Employee Financial Experience™ to your HR offering.

[Let's Talk]

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