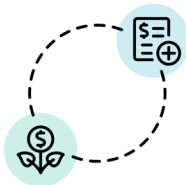


# 5 Strategies to Boost Financial Wellness Engagement

Financial security is essential for a focused, engaged, and productive workforce. The financial programs you offer not only help employees save for what matters but also foster a culture where team members feel valued. But participation and “buy-in” don’t always come easy.

By combining targeted communication, leadership support, technology, and strategies that connect benefits to meaningful moments, you can better motivate action, increase contributions, and empower employees to make confident financial decisions.

**Here are five proven strategies to help you drive meaningful engagement.**



## Incentives Motivate Action

Research shows that participation increases when it feels rewarding and incentives are a great way to expand program engagement.

- **Offer a direct, one-time contribution** to HSA, FSA or other wellness accounts.
- **Create excitement** with raffles or free financial coaching.
- **Celebrate milestones** to reinforce positive financial habits.



## Build Trust Via Leadership Support

When leaders visibly advocate for their team’s financial wellness, it boosts credibility and buy-in.

- **Appoint “executive champions”** as program ambassadors.
- **Share leadership endorsements** in company communications.
- **Encourage leaders to share** their experiences to normalize financial conversations.



## Connect During Life’s Key Moments

Employees engage more when guidance comes at the right time. Maximize impact by timing outreach to when employees are already thinking about their finances.

- **Open Enrollment:** Utilize updates to assist with health, retirement & HSA decisions as lives change.
- **Bonus & Merit Increases:** Highlight smart ways to use extra income.
- **Life Milestones:** Offer resources for marriage, homebuying, or starting a family.



## Communicate Clearly & Consistently

Share financial wellness info through familiar channels:

- **Use digital spaces** like your intranet, benefits portal, and chats.
- **Add signage** for hybrid and in-office teams.
- **Include reminders** on total reward statements to highlight benefit value.



## Customize Your Team's Experience

A one-size-fits-all approach rarely works. Instead, tailor outreach to make financial wellness accessible and relevant.

- **Craft messaging** to career stage, from managing student loans to buying a home or preparing for retirement with catch-up contributions.
- **Partner with Employee Resource Groups (ERGs)** to host tailored, community-centered workshops.
- **Gather feedback** via surveys to refine outreach.

## Measure Success & Highlight Wins

By regularly measuring progress and sharing team achievements, you reinforce your program's value and build lasting momentum organization-wide.

Some meaningful metrics include:

**Increased contributions:** Demonstrates higher participation and increases in savings.

**Reductions in 401(k) loans or hardship withdrawals:** Signals improved financial stability and confidence.

**Employee-reported financial confidence:** Reflects the positive impact your program is having on employees' well-being.



**Showcase team member successes to show the real-life impact of your financial wellness program.**

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