

FINANCIAL WELLNESS

Financial Wellness Essentials

Helping millions save for what matters

Your employees deserve to feel in control of their financial future. That's why Ascensus has partnered with Financial Finesse to offer unbiased, personalized financial coaching. Included in your retirement plan, this benefit can improve employee well-being—and deliver positive returns for your business.



Meet Aimee™: Your virtual financial coach

- Personalized coaching to help maximize compensation and benefits
- Dynamic Financial Wellness Score™ and action plan
- Instant answers to financial questions with "Ask Aimee Anything" AI-powered search



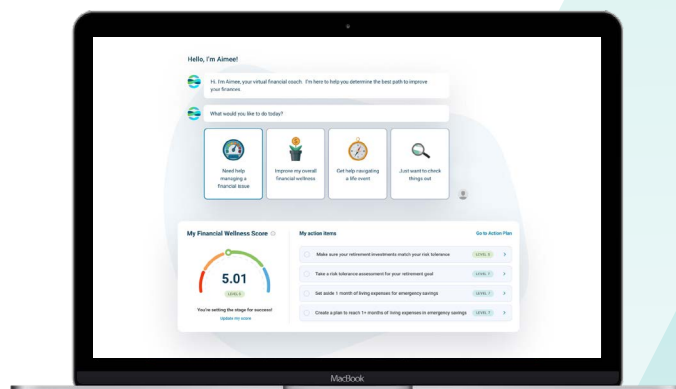
Financial wellness hub

- Robust, multi-media education library
- Tools to help with budgeting, debt management, college savings, retirement, and more



Engagement emails

- Topical content and personalized nudges
- Delivered directly to employees



Financial wellness is good for business

Financial stress can impact productivity and retirement readiness. With the right tools, employees build financial resilience.

30% of employees who did not have emergency savings now have at least \$1,000 set aside.¹

For Plan Sponsor Use Only

¹ Financial Finesse Financial Wellness Think Tank™, analysis of employee engagement in plans offering Financial Wellness Essentials as of 10/15/2024.

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