

A Guide to Financial Wellness Plus

Financial Wellness Plus from Financial Finesse gives your employees and their family members unlimited access to unbiased and confidential financial coaching, personalized action plans, and more. This valuable benefit can lead to improved quality of life for your employees—and positive returns for your business.

BENEFIT YOUR BUSINESS

See what's available and learn how offering a financial wellness program can help you attract and retain employees.



Access ready-to-use presentations, workbooks, and videos about retirement, investing, and finance for employees at all stages of their career.

More

Listen to real stories from three employees who worked with a Financial Coach.

Coaching Stories

Plan Sponsor Flyer

PROVEN RESULTS

↑ 54%

increase in employees who are "on track to retire comfortably."¹

86%

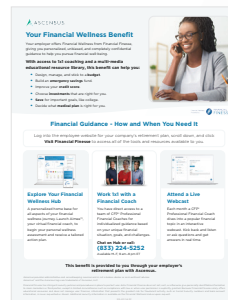
of employees say financial well-being benefits impact their desire to stay with their employer.²

SHARE WITH YOUR EMPLOYEES

Engaged employees feel less stressed about finances and more financially prepared for the future.¹

Easily promote this benefit with this customizable email template and flyer.

Email Template



Employee Flyer

HELP EMPLOYEES GET STARTED IN 3 SIMPLE STEPS:

1. Register or log in to the employee website for your company's retirement plan.
2. Click **Financial Wellness** from the main navigation.
3. Access all the resources available on the **Financial Wellness Hub**—including 1x1 financial coaching, a personalized action plan, and more!



Tips to drive success:

1. **Make sure employees never miss an email.** Add hello@financialfinesse.com to your company's safe sender list.
2. **Promote frequently to raise awareness when employees need it.** Resources are available in the Financial Wellness Hub to help with cyclical events like open enrollment and tax season, and for milestones like buying a home or getting married.
3. **Show your company's commitment.** Schedule 10-20 minutes of paid time or offer incentives, if you can, for employees to get familiar with their benefit.
4. **Try it out for yourself.** You have access to all of these great benefits too!

The value of partnership

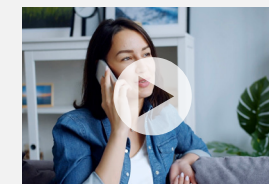
Ascensus + Financial Finesse = big savings for you.

Financial Finesse Retail Pricing:

\$12,000 licensing fee, \$23 per participant annually (does not include online chat)

Your Pricing:

\$0 licensing fee, \$15 per participant annually (includes online chat)



Watch how Financial Wellness is changing financial lives.

¹Financial Finesse Financial Wellness Think Tank, five-year study of engaged Financial Finesse users from 2016-2021.

²The Future of Workplace Financial Well-Being: 2022 Employer & Employee Perspectives. SoFi at Work.

Ascensus, LLC provides administrative and recordkeeping services and is not a broker-dealer or an investment advisor.