PoweredBy FINANCIAL FINESSE

ASCENSUS

Empower Your Practice with Financial Wellness

A PARTNERSHIP THAT COMPLEMENTS YOUR ADVISORY ROLE

The Ascensus retirement solution features an integrated financial wellness program, designed to support your practice by enhancing client outcomes without competing with your advisory services. Our program helps participants build a strong financial foundation, which allows you to focus on delivering high-value, strategic guidance.

COMPLEMENT YOUR EXPERTISE

Our award-winning financial wellness program, powered by Financial Finesse acts as a valuable extension of your services. It handles foundational financial education, which frees you to concentrate on more complex planning and advisory functions where your expertise is needed most.

- **Foundational Education:** The program addresses essential topics like budgeting, debt management, and basic saving principles.
- **Strategic Focus:** With participants better informed about financial basics, your conversations can be more productive and centered on long-term strategy and sophisticated investment advice.
- **Efficient Partnership:** Our program tools and resources work in concert with your efforts, creating a seamless support system for your clients.

A recent Mercer survey revealed that expanding Financial Wellness is the top priority for

39%

of plan sponsors, citing improved retirement readiness as a key benefit.[1]

IMPROVE CLIENT OUTCOMES

By providing employees with tools to manage their day-to-day finances, you empower them to build greater financial confidence and security. This directly contributes to better retirement readiness and overall satisfaction.

- **Reduced Financial Stress:** Access to financial education and planning tools helps reduce employee financial anxiety, which is a common barrier to saving.
- **Increased Retirement Readiness:** When participants feel more in control of their current finances, they are better prepared and more likely to engage with and contribute to their retirement plans.
- **Informed Decision-Making:** Our program equips participants with practical financial knowledge that supports thoughtful decision making and long term financial well-being.

[1]Mercer, 2025. https://www.mercer.com/assets/us/en_us/shared-assets/local/attachments/pdf-survey-report-2025.pdf

STRENGTHEN CLIENT RELATIONSHIPS

Offering a holistic solution that addresses your clients' broader financial well-being demonstrates a deeper commitment to their success. This strengthens your position as their trusted advisor and fosters long-term loyalty.

- **Enhanced Value Proposition:** Differentiate your practice by providing a comprehensive solution that supports employees' complete financial journey.
- **Increased Loyalty and Retention:** When clients see the positive impact of the wellness program on their employees, it reinforces their trust in your guidance and strengthens your partnership.
- **Proactive Support:** Offering these resources shows you are proactively addressing the challenges your clients and their employees face, solidifying your role as an essential partner.

Choose the level of support that best fits your client's business and budget.

Financial Wellness Essentials is already included with the recordkeeping services provided by Ascensus. For a more comprehensive experience, your client can elect **Financial Wellness Plus*** for just $15 per plan participant annually—with no minimum cost.	**ESSENTIALS** (no cost)	**PLUS** ($15/participant annually)
Virtual financial coaching from Aimee™, with personalized action plan and dynamic Financial Wellness Score™	✓	✓
Online access to multimedia education library on the Financial Wellness Hub	✓	✓
Timely Financial Finesse educational emails	✓	✓
Monthly webcasts on relevant financial wellness topics		✓
Online chat with Financial Coaches for employees and their families		✓
Unlimited phone access to Financial Coaches for employees and their families.		✓

*PLUS may not be available for certain retirement products. Please consult your sales representative for details.

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