

Personalized Financial Coaching Proven to Change Lives

Hear how three very different end-users improved their finances and their lives by taking advantage of their employer-provided financial wellness benefit and working with an unbiased financial coach at no cost to themselves.

Achieving the Dream of Homeownership

“To be able to pick up the phone on a whim and ask questions about anything to do with life and finances has been a godsend for me.”



See how building an ongoing coaching relationship took Kathleen from dreaming about homeownership to being a homeowner.



See how Randy and his wife worked with a coach to think through investments, budgeting, retirement savings plans and debt elimination strategies.

Eliminating Debt as a Couple

“Our experience was great. Our coach talked to us about a lot of things... the big piece for us was getting a strategy to knock out some of the debt we had accumulated.”

Going from Surviving to Thriving

“The trajectory of my life is forever altered because of a free resource provided by my employer. I went from hopeless to hopeful.”



See how regular coaching empowered Erlinda to get back on her feet after a tough divorce, setting off an 'upward spiral' that not only improved her finances but also her health and happiness.

Meet the Coaches

Experienced, passionate and 100% unbiased, Financial Finesse coaches are available to help your employees as much as they need for as long as they need.

All Personal Financial Coaches™:

- Have a CFP® designation and 10+ years of experience
- Look out for your employees' best interests only and do not sell anything, ever
- Pass an eight-step recruiting process and once hired, quarterly service quality reviews
- Are trained in behavioral finance techniques
- Love helping people achieve their financial goals

Coaching team credentials include:

CFP®, CPA, CFA®
 PhD, JD, MFP, MSFS
 MBA, ChFC, PFS
 AFC, CEBS

Meet just a few of our Coaches:



Jim Jacobucci
 CFP®, MBA
 Chicago, IL



Linda Robertson, CFP®, ChFC®, CEBS, MSFS
 Philadelphia, PA



Anita Pippin, CFP®
 Charlotte, NC



Nadia Fernandez
 CFP®, CDFA®
 Los Angeles, CA



Cyrus Purnell
 CFP®, MBA
 Memphis, TN



Erik Carter
 CFP®, JD
 New York, NY

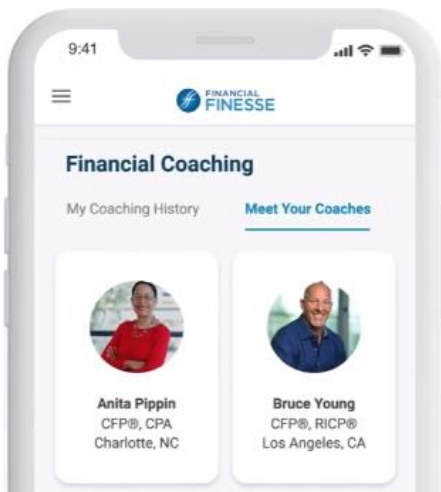


Brian Kelly, CFP®
 Omaha, NE



Kari Cedergren, CFP®, AIF®, CWS®, CRC®, CDFA®
 Minneapolis, MN

[Get to know more Coaches here](#)



Our Coaches receive heartfelt reviews every day.

"I can't imagine our call being any more helpful, it was amazing! Thanks so much!"

"After attending your retirement planning webcast, I immediately increased my 401(k) contribution."

"Our call was VERY helpful. Moreover, it was thought-provoking—it inspired my wife and I to kick around ideas about our financial plan, retirement and legacy."

"I liked that there was no wait time, no holding time, no appointment necessary. I just called when I had a moment, and they were there and ready to answer my questions."

Changing Financial Lives: Measurable Results

Research shows, employees who engage with their financial wellness benefit regularly see incredible quality of life gains.

Engaged employees experience:¹

↑ 60%

increase in feeling financially prepared for the future

↓ 28%

decrease in feeling stressed about finances

↑ 50%

increase in average retirement plan contribution rates (from 6.3% to 9.4%)

Employees make positive changes right away²

Within **30 days** of interacting with a coach, employees took action(s) to improve their financial futures:



Top actions taken:

- Reviewed asset allocation
- Reduced monthly expenses
- Reduced credit card debt
- Increased 401(k), 403(b) or 457 contributions
- Made changes to retirement investments

Employees continue to improve over time²

Employees who take our patent-pending Financial Wellness Assessment more than once show progress across categories.

Emergency Fund

I have an emergency fund to cover unexpected expenses or to pay bills for a few months.



Debt

I am comfortable with my debt.



Retirement

I know I am on target to replace at least 80% of my income in retirement.



 = Initial Assessment  = Most Recent Assessment