

The Financial Wellness Difference

Complement your value. Save time. Benefit your clients.

Financial Wellness is a holistic program that provides unbiased education and guidance to help employees achieve financial security and well-being in all aspects of their lives.

This benefit is powered by Financial Finesse, a pioneer in the industry and leading independent provider of workplace wellness benefits since 1999.

DELIVER A BENEFIT EMPLOYEES EXPECT

Now more than ever, employees are turning to their employer for help navigating day-to-day financial concerns. Providing a financial wellness benefit meets this employee need and has the potential to lead to positive returns for employers including reduced employee turnover and improved retirement preparedness.¹

84%

of employees believe their company should be responsible for their financial well-being.¹

86%

of employees say financial well-being benefits affect their desire to stay with the employer.¹

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

<p>Financial Wellness Essentials is already included with the recordkeeping services provided by Ascensus.</p> <p>For a more comprehensive experience, your client can elect Financial Wellness Plus for just \$15 per plan participant annually—with no minimum cost.</p>	ESSENTIALS (no cost)	PLUS (\$15/participant annually)
Virtual financial coaching from Aimee™, with personalized action plan and dynamic Financial Wellness Score™	✓	✓
Online access to multi-media 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		✓

THE VALUE OF PARTNERSHIP

An offering of this caliber has traditionally been reserved for mega plans with over 10,000 participants at a cost well into the six figures.² Because of our partnership with Financial Finesse, Financial Wellness is available to Ascensus clients at a fraction of the price, eliminating licensing and minimum entry fees—and enabling you to give all of your clients access to award-winning educational resources and services that may otherwise not have been available to them.

A PARTNER TO ADVISORS

Consider Financial Finesse a complement to your business, helping you increase your capacity to connect with more participants on higher-value focus areas. Financial Wellness can benefit you and your practice in a variety of ways.



Improve client satisfaction

Offering a financial wellness benefit has the potential to drive cost savings for your client through increased productivity, decreased absenteeism, and more.³



Expand your reach

Financial Coaches can serve as an extension of your practice. They don't hold securities licenses to sell or promote products or services, and can direct employees back to you for financial planning advice.⁴



Gain insights

Virtual financial coach, Aimee, collects data that can help identify employee trends, potential needs, and financial education opportunities. Individual data is kept 100% confidential.



Save time

Financial Finesse offers ready-to-use educational workbooks and presentations on financial topics from investing to retirement.

Contact your regional vice president at **800-345-6363** or retirementsolutions@ascensus.com for additional details.

¹The Future of Workplace Financial Well-Being: 2022 Employer & Employee Perspectives, SoFi at Work.

²Data from Financial Finesse, Inc., 2022.

³Financial Finesse Financial Wellness Think Tank™; five-year study of Financial Finesse end users who engage with their financial wellness benefit regularly (defined as taking their Financial Wellness Assessment at least 1x/year).

⁴Financial coaching is available via phone or online chat with Financial Wellness Plus.

For financial professional use only. Not for distribution to the public.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® in the U.S., which it awards to individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

Financial Finesse is an information service only. The information provided is for general education purposes only and is not intended to substitute for the advice of your investment, legal, and tax advisors or to be the basis of specific trading or investment activity. Financial Finesse is a trademark of Financial Finesse, Inc.

Ascensus provides administrative and recordkeeping services and is not a broker-dealer or an investment advisor. Ascensus has no responsibility or liability as a result of the use or content of the Financial Finesse products. Some of the information in this material is provided by third parties. Ascensus, LLC is not responsible for any content or information provided by third parties.

Ascensus® and the Ascensus logo are trademarks of Ascensus, LLC.

Copyright ©2022 Ascensus, LLC. All Rights Reserved. 835351-PSG 842500 (5/22)