

<Company Name>

Financial Wellness Impact Report



GoalPath
SOLUTIONS

NEW EMPLOYEES



ADDED

43

We identify new employees you add to the plan and invite each one to take their Financial Wellness Assessment and register for GoalPath Online.



8

REGISTERED

Data Range [date]

LET'S MEET

Your employees have many opportunities to interact with our team of financial coaches through individual financial coaching sessions or live monthly financial education webinars.

12

**COACHING
SESSIONS**

88

**WORKSHOP
REGISTRATIONS**

Data Range [date]

EMPLOYEE PARTICIPATION

123

**TOTAL USERS
REGISTERED**

%

PARTICIPATING

Employees who register for GoalPath enjoy access to tools that will help on their financial journey. Every user will find features to support their financial goals, from educational resources, including workshops and articles, to account aggregation tools designed to analyze their budget and investments.

Average Participation:

Data Range [date]

Your Program Impact

GOALS COMPLETED

Each employee's financial wellness journey is unique. We'll help prioritize and set goals to pay off a credit card, build an emergency fund, save for college, or a financial goal personal to them. Actions are "to-do's" they complete along the way to their personal success.

19

**ACTION
ITEMS
TAKEN**



(TO-DOS COMPLETED + GOALS COMPLETED)

Data Range [date]

PERSONALIZED ASSESSMENTS

78 **TAKEN**

1,170 **QUESTIONS
ANSWERED**



GoalPath's Financial Wellness Assessment helps employees understand where their greatest need is and where to focus attention. They are welcome to retake their assessment whenever they would like to update based on their progress.

Data Range [date]

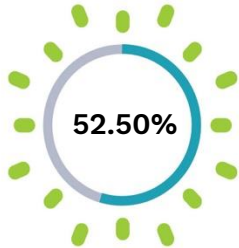
NEWSLETTER ENGAGEMENT

Sending a newsletter is one thing, but understanding its impact is another. We track open rates as a measure of engagement of the impact our communications make.

NEWSLETTERS



SENT



OPENED

Average Open Rate:

Data Range [date]

LINKING FINANCIAL ACCOUNTS

GoalPath's mission is to help your employees build a better relationship with their money. Let's face it, we lead complicated financial lives and have financial relationships with multiple institutions. When your employees link their account information, they will have the ability to easily see where it all goes. It makes budgeting tools and personal investment analysis work that much better by creating clarity about how they can improve their financial lives.

132 TOTAL ACCOUNTS LINKED

19 EMPLOYEES PARTICIPATING

Utilization

Average Utilization:

Data Range [date]

ESSENTIAL ANSWERS

CALCULATED LIFETIME INCOME

76



1

ENGAGED FOR FINANCIAL ADVICE

When it comes to Financial Wellness, some people prefer a "Do it with me" approach and tend to schedule one-on-one coaching sessions. "Do it myself" folks tend to prefer online tools and a self-paced path. Either way, we want all of them to use our Lifetime Income Calculator to answer the essential questions, "How much income will I have when I retire?"

Data Range [date]

EMPLOYEES LOVE THEIR GOALPATH FINANCIAL WELLNESS EXPERIENCE

98% of Employees

would highly recommend the
GoalPath Financial Wellness
program to their peers.*

Our passion lies beyond delivering high quality education and wellness information. It's in helping people feel empowered to make more confident decisions about their personal financial path.



I loved how there was no pressure or feelings of judgement around sensitive and vulnerable information, and I really left feeling hopeful about getting on track.

Nashville, TN



Mandan, ND



Super helpful advice - broken down into really manageable chunks, really tailored to where I was at!



GoalPath has truly changed my life by setting me up for my financial future and the potential of creating generational wealth for my family. I am truly inspired by my coaches who have centered relationships, patience, and wisdom in each conversation.



Miami, FL



2022 GoalPath Financial Workshops

January – Financial Awareness Month

GoalPath: Financial Planning for All

February – America Saves Week

America Saves Week: Pay Yourself First

March – Debt Awareness Week

Strategies for Paying Off Your Debt

April – Financial Literacy Month

Building a Better Relationship With Your Money

May

The Roth IRA: Strategies and Advantages

June

Retirement: How Do I Get There from Here

July

What to Do With That Old 401(k): Is a Rollover Right For Me?

August – Aug 14th is Financial Awareness Day

Am I Invested Right For Me?

September – Life Insurance Awareness Month

Life Insurance & Annuities: When Might You Need It?

October – Financial Planning Month

Retirement Income Planning: The Distribution Phase

November – National LTC Awareness Month

Long-Term Care Insurance

December

Year-End Review: Finish Strong and Plan to Start Right

THE POWER OF ONE

Every employee you help benefits your company's bottom line.

Here are a few stats that represent our experience working with many employers.

\$50k

average employer cost for a single employee who delays retirement for one year.



Employer healthcare costs *decrease up to 5%* when employees participate in financial wellness programs.²



88%

Percentage of employees *who have used the financial wellness services* provided by their employers in 2021.³

Seven in ten employees feel financial wellness programs helped reduce stress and increased loyalty to their employer.⁴



63%

of employees say that their financial stress has increased since the start of the pandemic.⁵

Employees who have control of their financial life sleep better, have more energy, less stress, and are more enthusiastic team members for you.

The statistics presented here summarize the experience of many companies. Your mileage may vary.



GoalPath
SOLUTIONS

Sources

- <https://pensionmark.com/blog-post/when-employees-retire-matters-to-them-and-toemployers/>
- <https://www.hrmorning.com/articles/financial-wellness-program-benefits/>
- <https://www.pwc.com/us/en/services/consulting/workforce-of-the-future/library/employee-financial-wellness-survey.html>
- John Hancock, 2019
- PwC's 10th annual Employee Financial Wellness Survey, PwC US, 2021

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