



Financial Wellness Program for Employers

THE RIGHT TECHNOLOGY PLUS CFP VIRTUAL COACHES HELP YOU MAKE A BIGGER IMPACT

Financial Wellness means many things in the market. To GoalPath, it means providing the resources, system, and processes to deliver a **financial planning experience with a fiduciary advisor to everyone.**

While many financial Wellness offerings are exclusively delivered through technology, the most important feature of our program is its human element. That's why employees in every company are invited to connect with one of our CFP virtual coaches. And it's easy to do via a simple online scheduler.

Our Financial Coaches Help People

- + Dealing with high debt
- + Starting their first financial plan
- + Who have questions about saving for their future
- + Understand their financial assets

We Pair Our One-on-one Coaching with...

- + Monthly workshops on financial education
- + Informative Newsletters with actionable suggestions
- + Prizes and incentives for those who take positive action

Financial Education Workshop Topics

- + Financial Planning for All
- + Pay Yourself First
- + Strategies for paying off debt
- + Building a better relationship with your money
- + A Roth IRA: Strategies & Advantages
- + Am invested right for me?
- + Retirement: How do I get there from here?
- + An old 401k: Is a rollover right for me?
- + Life Insurance & Annuities
- + Retirement Income Planning: Distributions
- + Long-Term Care Insurance
- + Your Year End Review

GoalPath Impact Report

Employers periodically receive a report that quantifies the impact their financial wellness program is producing:

- + New employees enrolled
- + Employees actively participating
- + Number of coaching sessions
- + Number of workshop registrations
- + The number of positive "to-do" items or goals completed
- + Personalized assessments taken
- + Engagement via email newsletters
- + Number of employees linking financial accounts to create better clarity on their complete picture