CERTIFIED FINANCIAL PLANNING — Complimentary for EVERY Employee!

Personalized Financial Planning Experience

This program provides participants with the tools and expert guidance they need to navigate their unique financial journey.

Every employee receives access to —

- **A Dedicated Financial Planner**
  Personalized advice tailored to each participant's preferences, requirements, and financial status — accessible via phone or video conference.
- **Digital Dashboard and Planning Tools**
  Individuals can model financial scenarios, prioritize personal financial goals (needs, wants, and wishes), and utilize collaboration tools with their dedicated financial planner.
- **Comprehensive Reporting**
  A robust, personalized financial planning report is delivered digitally, with additional guides for important household information included.

A Tangible Benefit to Attract and Retain Top Talent

Offer your employees comprehensive financial planning services designed to support their personal goals and financial well-being.

- Retirement readiness
- College planning
- Insurance coverage
- Long-term care
- Health savings accounts
- Enhanced tax reviews
- Roth conversion planning
- Income planning
- Estate planning
- *... and more!*

Get in touch to discuss this exclusive benefit!

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