Lawley

RETIREMENT ADVISORS

# Financial Wellness

## Why is Financial Wellness Important?

*While we understand the importance of taking care of your employees' mental and physical wellness, we also recognize financial wellness as another aspect of overall health that many employers don't focus on.*

**1 in 5** One in five people admit to skipping work to take care of financial problems.

**70%** Seventy percent of HR professionals say financial issues impact performance of workplace savings plan.

**$50K** $50,000 is the estimated cost per year for each employee that stays one year past retirement age.

**55%** Fifty five percent of employees avoid dealing with their financial situation.

**89%** Eighty nine percent of employers want to offer financial wellness. Only 20% are actually doing it.

## *What is financial wellness?*

Financial wellness is the ability of individuals to manage daily finances while setting short-and long-term saving goals so they can invest in a secure financial future.

Our program helps employees understand healthy saving and investing behaviors that are attainable and maintainable over time. Our program includes:

TOPIC ONE:
***Budgeting***

TOPIC TWO:
***Debt Management***

TOPIC THREE:
***Saving & Investing***

TOPIC FOUR:
***Protecting Your Future***

*To learn ways we help your employees with financial wellness programs:*

**lawleyretirement.com**
855.841.1135

# Financial Wellness Program Details

| | ***Description*** | ***Cost*** |
|---|---|---|
| **1** | **CLIENTS OF LAWLEY RETIREMENT ADVISORS**<br>As a consultant to your plan, this educational program is included as a service to you. | **INCLUDED** |
| **2** | **PROJECT BASED**<br>Our well-versed financial wellness team will provide customized presentations and materials to your employees. | **$175 PER HOUR**<br>*A. Entire series B. A la carte* |
| **3** | **INTERACTIVE PLATFORM**<br>In addition to in-person presentations and materials, we will include web-based connectivity from Edu(k)ate, a financial wellness solution that provides curated content and interactive learning tools. | **$10 PER EMPLOYEE**<br>*Per year ($500 Minimum)* |

## Presentation Topics

### Topic One | *Budgeting*

Learn more about how to live your life to the fullest while staying in your financial means and saving for the future.

### Topic Two| *Debt Management*

How can you save for retirement with pre-existing debt? Learn how to manage costly debt in order to put more money in savings.

### Topic Three | *Saving for Your Future*

Understand the importance of creating a financial plan and managing your investments wisely to help you reach your goals.

### Topic Four | *Protecting Your*

Learn why estate planning and personal insurance (Life, Disability, and Long Term Care) play an important role in your financial plan.

*The Lawley Retirement Advisors' Financial Wellness Educational Series is an innovative way to help your employees get on the right track when it comes to their finances and future.*



LAWLEY RETIREMENT ADVISORS | *Retirement Plan Counsel*
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