



**Financial
Wellness**

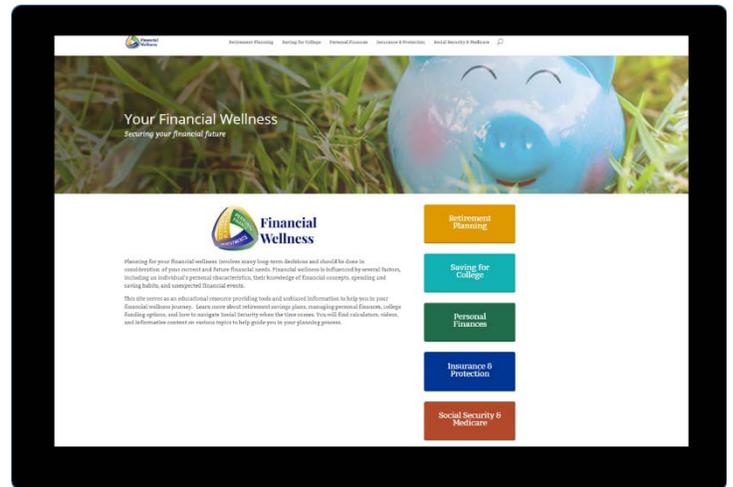


Financial Wellness Program

SELF-HELP WEBSITE

The Financial Wellness site is an unbiased educational resource providing a broad range of self-help tools and articles to help our clients achieve financial wellness.

Complete with calculators, videos, and informative content, resources are provided to assist individuals seeking guidance on a range of long-term planning topics.



Retirement Planning

Retirement is a significant life event for everyone. The Financial Wellness suite of tools is designed to assist clients in achieving a comfortable retirement.

Saving for College

Surveys show the second largest financial concern for many individuals is saving for their child's college education. These tools help our clients think through the various paths to achieving that goal.

Personal Finances

From debt management to financial planning to Understanding investments, there is a tool to help clients navigate their way to financial wellness.

Insurance & Protection

The Financial Wellness Program is complete with dedicated tools created to explain insurance and protection solutions to meet your needs. Self-help tools, including calculators, are available to see the extent of what any needs may be.

Social Security & Medicare

For many, Social Security and Medicare can be daunting topics. Financial Wellness tools range from basic to complex levels to help clients understand and plan for Social Security and Medicare needs.