



Financial Mentors Focused on Monetary Well-Being.

{ **mentoro** }

mentorogroup.com
678.867.7050

About Us

"By instilling healthy financial habits, Mentoro aims to create a happier and more productive workplace. "

Mentoro

Mentoro seeks to spread financial literacy in the workplace by providing unbiased financial education via experienced money mentors. We create customized programs tailored to company need that ease financial stress and equip employees to plan for their future. We place an emphasis on supporting our partnerships by driving positive participant results.

Engage + Examine + Educate + Empower

{ the opportunity }

Offering financial wellness to your employees is an opportunity to help in correcting a major crisis. The working population is living in a state of financial stress. They're spending more, saving less and jeopardizing their financial health in the process. Our solution aids in reducing loans and distributions, increasing contributions, and enhancing plan design through financial education and examination.

Companies are implementing financial wellness for two reasons. The first is to solve a problem in one of the following categories: Financial Stress; Retirement (un)Preparedness; Fiduciary Liability. The second is to achieve long term goals like employee retention, competitive advantage, and healthy turnover.

"Collaborative Financial Wellness"
Human + Technology + Behavior

Methodology

{ our methodology }

Our methodology focuses on program customization, reporting & measurement, participation, and implementation. We believe the key to success is creating lasting behavioral change by following a service model.

{ our vision }

We take a behavioral science approach to driving better results by enabling a deeper understand of why people make the choices they make and why they often fail to engage on key financial matters. Financial Wellness is not an event; it's an ongoing process that requires partnerships between members in our industry to help educate the general public.

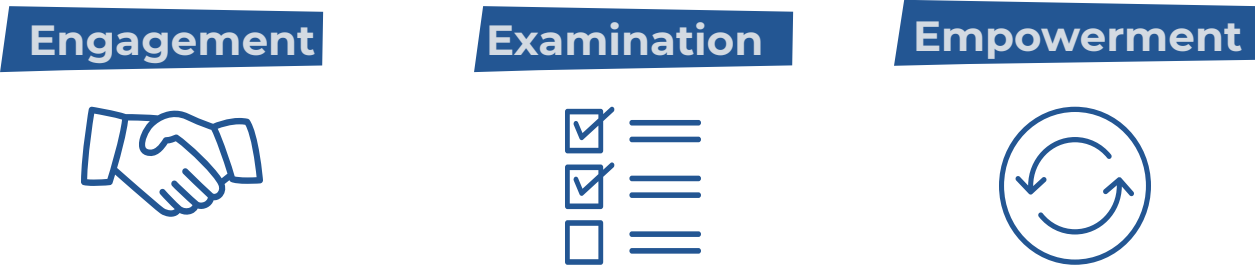
Collaborative Financial WellnessSM

Customized Unbiased Education



Monetary Momentum Service ModelSM

Behavior Change and Maintenance





Services

Standard Program Services Listed Below

{ mentoro implementation team }

Financial Advisor & Education Team
Workshops
One-on-One Consultations
Plan Management Team
Logistics Coordination
Automatic Enrollment for all eligible employees
Benefit Integration
Fiduciary Committee Representation

{ mentoro contact center }

Licensed Representatives dedicated to your plan
Toll Free Phone Number
Customer Service E-Mail
Digital Appointment Setting

{ mentoro portal & technology }

Participant Portal Access & Administration
Mobile-Friendly & 24/7 Accessible
Gamification
Program Feature Access: *Exam & Score Summary; Resource Center; Account Aggregation; Financial Planning Software; Contact Center; Benefit Services; Information; Participant Profile*
All future technology enhancements

{ mentoro reporting }

Participant: *Exam Summary & Dashboard*
Company: *Aggregate Report & Recommended Education Plan; Enrollment & Engagement Report; Actions Taken Report; End of the Year Progress Report*

{ mentoro marketing }

Participant Communications
Financial Fitness Class or Event Promotion
Notification of Financial Advisor on Site

Participant Access to Mentoro Network Specialists.

Contact Us Today for a Customized Proposal!

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