



## A Personalized Financial Wellbeing Solution



**Fifty-nine percent of employees cite money concerns as their biggest stressors and 88% of employees say they want some help with their finances.**

**MoneySteps provides unbiased financial information and guidance.** We help participants turn around difficult financial situations and learn healthy financial behaviors - without selling them anything.

### MoneySteps includes:

- Extensive on-demand multimedia content across a wide range of topics including budgeting, home buying, student loans, credit card debt, retirement, insurance, investing, and more.
- Regular newsletter featuring timely, relevant and accessible financial articles.
- Webinars with step-by-step guidance on financial trends and topics, available live or on-demand.
- Annual curated courses such as *Breaking Free From Debt* and *Rightsizing a Budget*.

### MoneySteps and Coaching

Personalized financial coaching can be added to the MoneySteps program. MoneySteps' certified financial coaches work directly with participants to improve their financial wellbeing by gaining confidence with their finances. Coaching sessions are completely confidential.

### The MoneySteps Foundation



**Knowledge and Habits:** MoneySteps provides a full spectrum of tools, resources, content and courses that are available 24/7 on any device. Content is produced and curated by in-house, credentialed financial experts.



**Behavioral:** Helping participants make positive changes in their spending and saving activities.



**Holistic:** MoneySteps addresses the complete financial picture - income, assets and liabilities and financial goals and aspirations.



**Empowering:** Employees receive the tools and support to seize control of their financial future. Content is customized for the individual's top priorities and circumstances.

### Learn more

Speak to a representative about offering MoneySteps as part of your wellness program design or email [moneysteps@financialwellbeing.com](mailto:moneysteps@financialwellbeing.com).

Greater Knowledge + Better Habits = Financial Wellbeing  $K^G + H^B = FW^G$

MoneySteps