

CONTACT

www.mentorogroup.com | (844) 324-2411

MEET YOUR FINANCIAL WELLNESS.

HOW WE CAN HELP

A turn-key financial wellness solution derived from the belief that the worksite is the last great hope for educating individuals on healthy financial habits.

OUR APPROACH

Collaborative Financial Wellness Solution



ENGAGING TECHNOLOGY



HUMAN INTERACTION



BEHAVIORAL FINANCE



CUSTOMIZATION & INTEGRATION

HOW WE CAN HELP

We act as your partner to provide a solution for your employees that decreases financial stress and increases employee retention and morale, which directly impacts your bottom line.

ANNUAL PROGRAM TIMELINE



ONBOARDING
WELCOME ORIENTATION



PHASE I | QUARTER 1
ENROLLMENT PERIOD
FINANCIAL FITNESS CLASSES
1X1 CONSULTATIONS



PHASE II | QUARTER 2
FINANCIAL FITNESS CLASSES
SPECIAL TOPICS
1X1 CONSULTATIONS



PHASE III | QUARTER 3
FINANCIAL FITNESS CLASSES
SPECIAL TOPICS
1X1 CONSULTATIONS



PHASE IV | QUARTER 4
FINANCIAL FITNESS CLASSES
1X1 CONSULTATIONS
REPORTING



RENEWAL
ORIENTATION

SELF GUIDED



- Online Resource
- Center Exam Dashboard To-Do's

COACH GUIDED



- 1x1 Consultations
- In Person or Virtual

GROUP GUIDED



- Financial Fitness
- Classes Presented by Educators