

Education to Strengthen Financial Confidence

There is a connection between being **financially confident** and being **financially well**. That's why education is a cornerstone of our financial wellness approach.

What is common across our educational touchpoints:

1. **Objective information** on a range of financial education topics
2. We share our experience to **educate** and **bring clarity** about options
3. We make it **relevant, practical**, and **straightforward**



We educate to build **financial confidence** and **encourage action** that can help support the path to **financial wellness**.

WORKSHOPS

We offer **in-person** and **virtual** workshops of relevance to people of all ages and at all life and career stages.



KEY EMPLOYEE/ EXECUTIVE RESOURCES

Workshops are not for everyone. We offer a **tailored service** to provide individual education and confidential consultation that addresses their own unique situation.

COMMUNICATIONS

Targeted communications that:

- **Simplify** what may be perceived as complex financial concepts
- Provide access to valuable **insights** on important financial topics
- Build knowledge that can help individuals move from **good intentions** to **actions**
- Point the way to **helpful resources**

It's time to start thinking differently.