

YOUR ROADMAP TO FINANCIAL WELLNESS

When was the last time you evaluated your financial wellness program provider or advisor? Here is a guide with questions to ask to ensure you are in good hands:

FOCUSED ON BUILDING A STRONG FINANCIAL FOUNDATION

1

Does your advisor formally recognize their fiduciary status with respect to employee advice?

Do they help with personal finance-related topics outside of the retirement plan?

Do they have a proven, repeatable process to ensure they are providing advice that helps your employees make the best decision for their financial future?

BUILT FOR YOUR UNIQUE EMPLOYEE BASE

2

Does your advisor conduct a confidential employee financial wellness assessment/survey?

Do your employees have access to their own, individualized personal finance dashboard?

Does your advisor use technology to keep your employees accountable for improving their financial lives?

OPEN ACCESS

3

Does your advisor meet your employees where they are by offering local, on-site meetings as well as virtual/phone?

Do they offer topical and timely group workshops to educate and build trust?

Do your employees have direct contact information for their dedicated advisor?
