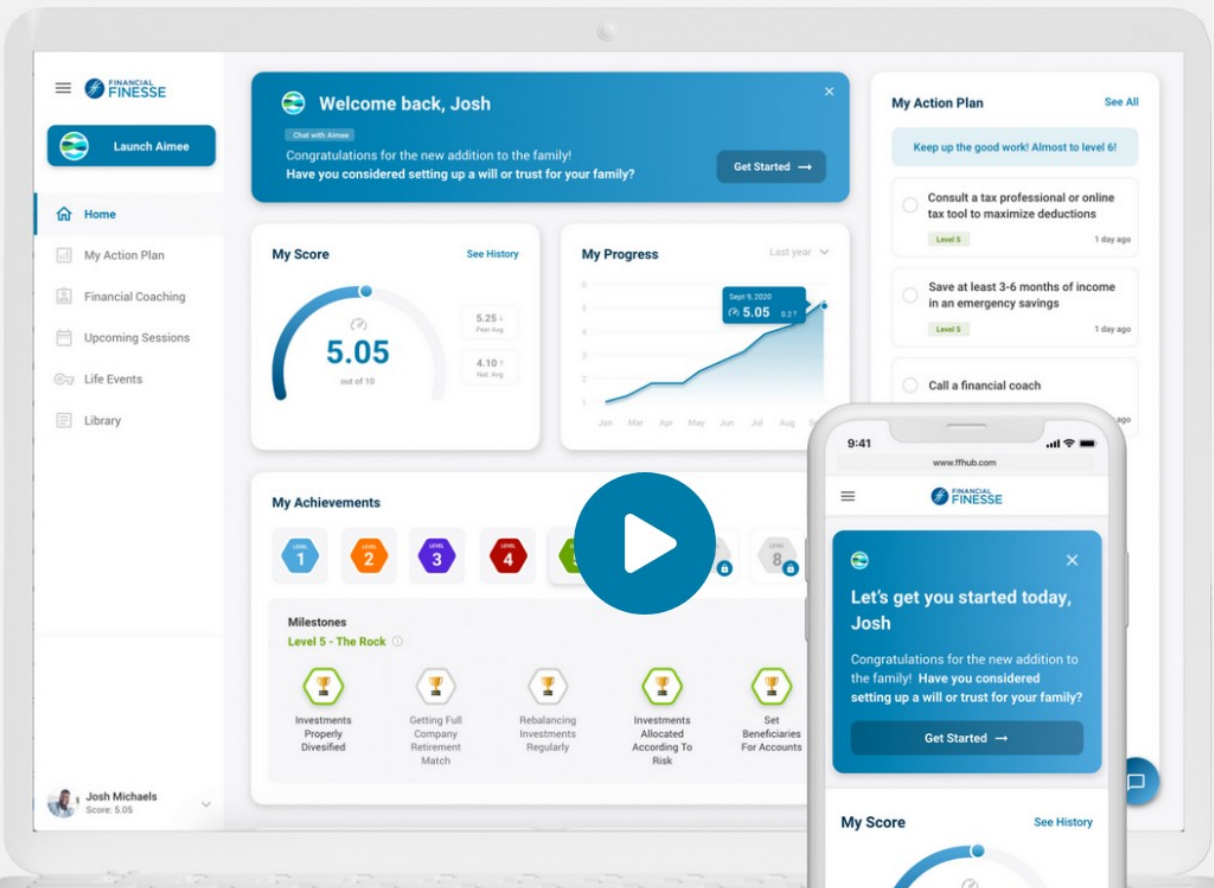


# Financial coaching that changes lives.

Empower your workforce with personalized financial guidance from the company that created financial wellness.

[Get Started](#)





## We believe everyone deserves access to **unbiased financial guidance.**

That's why in 1999 we invented financial wellness. For over 20 years, we've made it our mission to deliver life-changing financial coaching by partnering with employers who are dedicated to the well-being of their employees.



### **Personal Financial Coaching**

Financial guidance should not be a luxury product. We believe everyone should have access to life-changing financial coaching regardless of income.

[EXPLORE COACHING](#)



### **Strategic Financial Wellness Programs**

We partner with employers who understand their employees are their biggest asset, and structure programs that align with their strategic HR goals.

[START BUILDING](#)



### **Financial Wellness Think Tank**

Through our award-winning thought leadership and research, we're making sure the financial services industry doesn't forget the "service" part.

[LEARN MORE](#)

# aetna<sup>SM</sup>



**NFL PLAYERS**  
ASSOCIATION



**Nestlé**



VIAACOM

Our coaches have changed over 100,000 lives.

True Financial Wellness cannot be achieved through technology and financial products alone. Our team of CFP® professionals team up with our AI connect the dots between money and emotions to ultimately inspire real, quantifiable behavior change.



## Beyond Wellness

Employees who work with a Personal Financial Coach™ make better financial decisions, report a higher level of personal and professional satisfaction, and positively impact your bottom line.



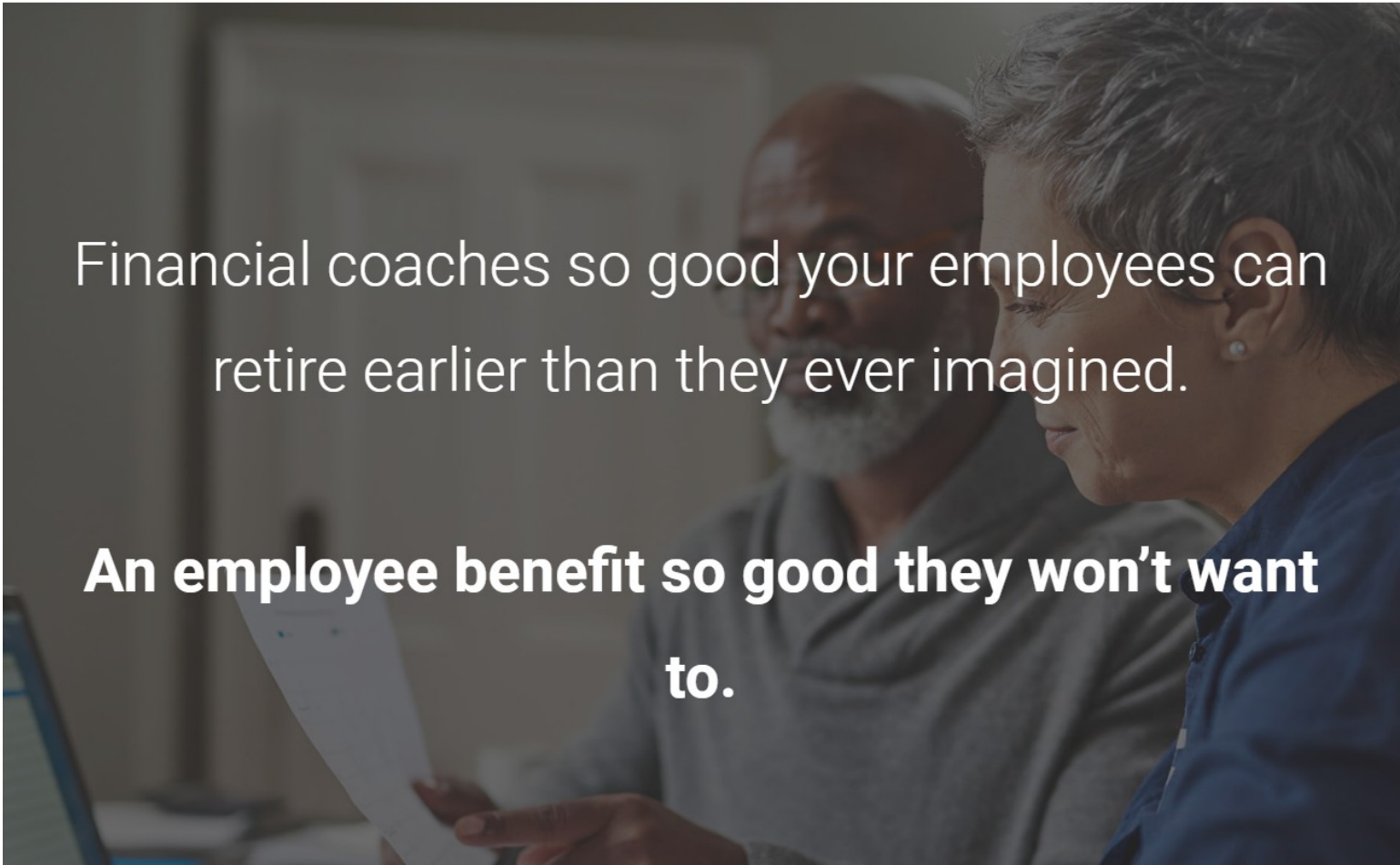
## Beyond Retirement

Whether you're trying to buy a \$500k house, save \$50k for your wedding, or pay-off your last \$5k in student loans, your Personal Financial Coach™ is your dedicated partner every step of the way.



## Beyond Benefits

As a Personal Financial Coach™, it's our job to know your company benefits better than you do and ensure your employees understand the significant investment you've made in their financial security.



Financial coaches so good your employees can retire earlier than they ever imagined.

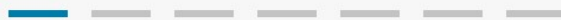
**An employee benefit so good they won't want to.**

▶ WATCH TESTIMONIAL



“This service is priceless. I know people that pay thousands of dollars a year to talk to someone like Greg and I get unlimited access for free as an employee benefit.”

– Aetna employee





MEET SOME OF OUR COACHES





The only guaranteed ROI is  
investing in the wellbeing of your employees.

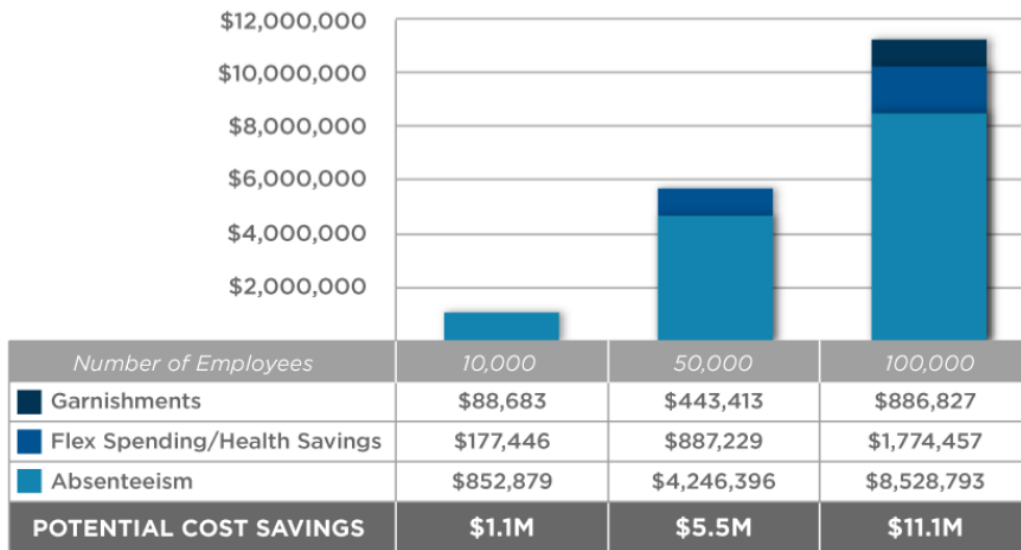
Whether your strategy is mission based or problem-centric, we specialize in defining the objective and metrics of your wellbeing investment, creating a unique employee experience to drive engagement, and delivering client success through ongoing support.

## **Wellbeing Strategy Consulting**

With twenty years of Financial Wellness experience, we dig into the data and leverage our award-winning predictive ROI model to assess your organizational challenges and determine an integrated program strategy that fully optimizes your long-term results.

## ROI SPECIAL REPORT

### Projected Cost Savings of Incremental Shift in Workforce Financial Wellness Score from 4-6

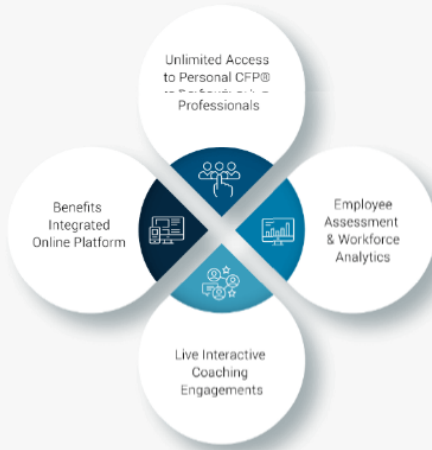


Based on an annual study of Fortune 500 employer utilizing multiple Financial Finesse services.

## Custom Program Design

Once we understand your strategic challenges and goals, we design a holistic employee experience, fully integrating your benefits, that delivers unbiased financial coaching when and where your employees need it and in their preferred learning style.

## BEST PRACTICES TO DRIVE UTILIZATION



## Ongoing Program Concierge

We do the heavy lifting for you. As your full service partner, our team of client service, marketing, technology and creative design experts is at your disposal, giving you everyday access to the high-touch support you need to create and deliver an award-winning program.

[CLIENT CASE STUDIES](#)



NFL PLAYERS  
ASSOCIATION

Best in Biz

**HR Department of the Year**

**aetna**<sup>™</sup>

Employee Benefit News

**Benny Award**

Benefits Leadership in Retirement Planning



Pensions & Investments

**Eddy Award**

Corporate Conversions

**VIACOM**

Plan Sponsor Council of America

**Signature Award**

Financial Wellness & Education

# Contact Us

Join our mission and empower your people to live well by doing good.

**First Name\***

**Last Name\***

**Email\***

**Organization Name\***

**Number of employees\***

**Any notes? (optional)**

**SUBMIT**



We are a people company on a mission to deliver life-changing financial guidance to those who need it most.

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