

— FINANCIAL WELLNESS

Tools and Tips for a Successful Financial Wellness Program

Financial Wellness, offered in partnership with Financial Finesse, is a valuable employee benefit included with your retirement plan. You can help reduce employees' stress and improve their financial well-being—especially during challenging times—simply by letting them know they have free access to personalized financial coaching and an array of educational tools and resources.

To make it easy, use this quick guide for offering a successful Financial Wellness program.

MEET AIMEE™—AND HELP YOUR EMPLOYEES CHANGE THEIR FINANCIAL LIVES

Financial Wellness With Aimee

See what's available to you and your employees, and learn how Aimee (Artificial Intelligence Motivating Employees Everywhere) is raising the bar with virtual financial coaching. Aimee enhances the Financial Wellness offering by getting to know each employee's unique financial situation and providing personalized, unbiased guidance in real-time to help improve it.

[Download](#)

Employee Email Template

You can easily share all the benefits of Financial Wellness with your employees. Simply download and copy the language from this email template, then paste it into an email from you. Feel free to personalize the email as much or as little as you see fit—you know your workforce best.

[Download](#)

Employee Handout

Provide your employees with an overview of Financial Wellness and how they can start taking advantage of the wealth of resources available to them. Include it as an attachment to the employee email, or post it to a shared location they can reference in the future.

[Download](#)

TIPS TO DRIVE SUCCESS

- **Make sure employees never miss an email.**
Financial Finesse sends educational emails (approximately monthly) to individuals who are registered on the employee website and have a balance in the retirement plan.

Some employees may use their work email for their Financial Wellness account. To make sure they receive these emails, add the following to your company's safe sender list: financialwellness@ascensus.com
- **Show your company's commitment.**
Schedule 10-20 minutes of paid time for employees to set up their accounts, meet Aimee, and receive their personalized action plan. If you can, consider offering incentives, like gift cards, for setting up their accounts.
- **Introduce Financial Wellness right away.**
Encourage new employees to explore the resources available on the Financial Wellness Hub for guidance with financial decisions that may accompany starting a new job or selecting benefits.
- **Promote the program both seasonally and during key life events.**
There are hundreds of resources available to assist employees with cyclical events like tax season and open enrollment, as well as life milestones like buying a home or getting married.
- **Try it out for yourself.**
Visit the Financial Wellness Hub and interact with Aimee yourself. This way you can speak from experience when sharing the benefit with your employees.

60%

of employees responded they're more likely to stay at a job that provided a useful financial wellness program.*

HOW TO ACCESS THE FINANCIAL WELLNESS HUB

1. Log in to the employee website
2. Navigate to **Wellness Center > Financial Wellness > Visit Financial Finesse**
3. Create an account by entering an email address (work or personal) and a password

*Source: Financial Health Network Survey "Better for Employees, Better for Business: The Case for Employers to Invest in Employee Financial Health," 2018.

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