Participant Financial Wellness Services

WHY PARTICIPANT FINANCIAL WELLNESS SERVICES?

Financially stressed employees cost employers thousands of dollars each year. Debt burdens, paying for college or wondering if retirement is possible, can compile to make employees financially unwell and distracted at work.

Education consultations and The Well suite of services from Advanced Capital Group help employees take action to improve their financial wellbeing. Financial wellness benefits can:

- Maximize participation in your retirement plan
- Reduce medical costs
- Increase employee productivity and engagement
- Act as a powerful recruiting and retention tool

EDUCATION CONSULTATION

Understanding retirement plan options is a key factor in employee participation in a retirement plan. We can help you determine strategic and customized educational options using:

- Strategic planning and collaboration with your recordkeeper
- Assessment and ongoing effectiveness evaluations
- Proprietary analyses that use your data to assess employee retirement readiness

AWARD-WINNING SERVICE

Advanced Capital Group is a consulting firm and Registered Investment Advisor (RIA) based in Minneapolis, MN. Our expert team uses a proactive and collaborative approach that enhances financial results for organizations and individuals.

50% of financially stressed employees spend 3+ hours at work each week thinking about or dealing with personal finances [1]

Put our vision to work for you

We are passionate about fostering creative ideas and exploring new opportunities for our clients. Contact us to learn how a customized relationship can help you succeed.

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THE WELL SUITE OF EMPLOYEE SERVICES

The Well is a suite of services built to help employees with financial questions and goals no matter their stage of life. It has three parts which can be offered independently or in tandem.

Group Education

Group education can be tailored to your retirement plan and delivered in-person or online. Partial and full-day options are available and may include one-on-one retirement related Q&A.

Foundational education topics include:

- Your Retirement Plan - Help employees make the most of their plan
- Finances for Life Planning - Inspire employees to manage all of their finances
- Pre-Retirement Planning - Strategies to leverage retirement savings
- Legacy Planning - Prepare for life after work

THE WELL®
Plan well. Live well. Retire well.

Interactive Learning Modules

Engaging and personalized learning is delivered through bite-sized modules on a variety of topics—like building emergency savings, considering home ownership, higher education and more. It's a mobile-friendly platform that's:

- Customizable with your unique benefits
- Supported by implementation, promotion and marketing collateral
- Includes a family learning center
- Can include Personal Financial Advisory and Group Education

Personal Financial Advisory

Give employees the freedom and flexibility to receive individualized guidance on financial topics that matter most to them, via one-on-one consultations with a CERTIFIED FINANCIAL PLANNER™ (CFP®). Personal financial advisory offers:

- Comprehensive and goal-based planning—including live assistance for specific questions
- Unbiased and tailored advice from a fiduciary, based on the employee's best interest
- Industry-leading, goal-based planning software
- Customized investment solutions through an Eligible Investment Advice Arrangement (optional)

[1] PWC Employee Financial Wellness Survey, 2017