

Lawley

RETIREMENT ADVISORS

Financial Wellness



Why is Financial Wellness Important?

1 in 3

Full-time employees say that worrying about finances negatively impacts their productivity at work.

70%

HR professionals say financial issues impact performance of workplace savings plan.

\$50K

\$50,000 is the estimated cost per year for each employee that stays one year past retirement age.

What is financial wellness?

Financial wellness is the ability of individuals to manage daily finances while setting short-and long-term saving goals so they can invest in a secure financial future.

While we understand the importance of taking care of your employees' mental and physical wellness, we also recognize financial wellness as another aspect of overall health that many employers don't focus on.

Our program helps employees understand healthy saving and investing behaviors that are attainable and maintainable over time.

To learn ways we help your employees with financial wellness programs:

lawleyretirement.com

855.841.1135

Financial Wellness Program Details

Description

Cost

1 **CLIENTS OF LAWLEY RETIREMENT ADVISORS**
As a consultant to your plan, this educational program is included as a service to you.

INCLUDED

2 **PROJECT BASED**
Our well-versed financial wellness team will provide customized presentations and materials to your employees.

\$500/SESSION

3 **INTERACTIVE PLATFORM**
In addition to in-person presentations and materials, we will include a web-based connectivity tool that provide a custom assessment and curated content.

CUSTOM PRICING

Per year (\$500 Minimum)

Presentation Topics



Topic One | *Budgeting*

Learn more about how to live your life to the fullest while staying in your financial means and saving for the future.



Topic Two | *Debt Management*

How can you save for retirement with pre-existing debt? Learn how to manage costly debt in order to put more money in savings.



Topic Three | *Saving for Your Future*

Understand the importance of creating a financial plan and managing your investments wisely to help you reach your goals.



Topic Four | *Protecting Your Future*

Learn why estate planning and personal insurance (Life, Disability, and Long Term Care) play an important role in your financial plan.

The Lawley Retirement Advisors' Financial Wellness Educational Series is an innovative way to help your employees get on the right track when it comes to their finances and future.

Securities and investment advisory services offered through Osaic Wealth, Inc. member FINRA/SIPC. Additional advisory services offered through Lawley Retirement Advisors. Osaic Wealth, Inc. is separately owned and other entities and/or marketing names, products or services referenced here are independent of Osaic Wealth, Inc.