



The Trend of Financial Wellness from a Time-Tested Perspective

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Why Care About Financial Wellness for Your Employees?

\$ = Most Common Stressor

People put health care on hold due to \$

1 in 3 say \$ prevents them from living healthy

Only 37% talk with family about \$ often

31% of spouses/partners say \$ is major source
of conflict and tension



SOURCE: American Psychological Association working with the Harris Poll: *The Stress in America Survey 2014*,
Paying With Our Health; <http://www.apa.org/news/press/releases/stress/2014/stress-report.pdf>



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44% experience migraine headaches, 2x heart attacks, more trouble sleeping and concentrating

Absenteeism & "Presenteeism" = Lack of productivity and employee engagement

Lower Customer Engagement
Lower Revenue
Higher Expenses



SOURCE: *Facts from SHRM About the Impact of NOT Being Financially Well*
<http://www.shrm.org/hrdisciplines/benefits/articles/pages/stressproductivity.aspx>



Yes!

Financial Wellness is Trendy; Yet It's Important



What We've Learned About Financial Wellness Over Time



Financial Wellness is **NOT** just an article or workshop.



What We've Learned About Financial Wellness Over Time



Financial Wellness is **NOT** just a "once a year thing."



What We've Learned About Financial Wellness Over Time



Financial
Wellness is
MORE than
any one
product or
program.



Any Questions?



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