

Help Your Employees See the Value of Their Benefits



Benefits Planning Program

Clarify Your Benefits

Do Your Employees Clearly Understand Their Benefits?

Simply communicating benefits is no longer enough. Companies are now in a position where they have to provide employees with ongoing guidance on how to manage their benefits.

For years, Financial Finesse's award winning benefits planning program has helped many of the nation's largest Fortune 500 companies to **design and develop customized, ongoing multi-channel benefits planning programs for their employees.**

How We Can Help

- ✓ Integrate your benefits into a patent pending online benefits planning platform so employees have a one-stop-shop online for information and guidance on all their benefits.
- ✓ Design and deliver customized benefits planning workshops/webcasts and 1x1 financial planning sessions at locations across the country as part of open enrollment, retirement exit-planning and new hire orientations.
- ✓ Design and deliver customized curriculum to help employees strategically manage health care options.
- ✓ Effectively communicate significant benefits changes.



Total Benefits Planning Programs

Programs include:

- » Highly customized full program design.
- » Custom curriculum on your specific benefits.
- » Benchmarking to show employees how your benefits compare to other organizations.
- » Customized marketing plan and materials.
- » Full service implementation and delivery of programs.
- » Detailed reporting on results and a case study to share with your executive team.

Programs provide ongoing benefits guidance on all your company's benefits:

- » Retirement plans
- » Health insurance
- » HSA/FSA
- » Dependent care accounts
- » Estate planning benefits
- » Stock options
- » Employee stock purchase programs
- » Life/long term care/disability insurance
- » Tuition assistance programs
- » Wellness/Worklife benefits



Employer Results

We've helped our clients address a myriad of HR challenges with custom solutions designed for their specific workforces:

Benefits Challenges

Benefits Planning Solutions

Preventing unionization by clarifying benefits available to non-union employees.	Multi-channel program incorporating customized benefits planning workshops, 1x1 benefits planning sessions and phone-based financial coaching for all manufacturing plants, with special focus on those at greatest risk of unionization.
Integrating new acquisitions into parent company's benefits.	Intensive benefits planning workshops mandatory for every employee with enrollment forms distributed within the workshop and 1x1s available to employees needing more guidance.
Effectively communicating significant health care and retirement benefits changes .	Both broad-based and customized workshops and webcasts around specific benefits, with specific focus on helping employees navigate the changes.
Organizing hundreds of benefits into an understandable Total Benefits Program so that employees could readily see value of their benefits and access information from a single source.	Patent pending online platform designed to get employees specific information and guidance on ANY of their benefits within 5-7 seconds.

Results

No additional unionization on any of the manufacturing plants who launched benefits planning programs for employees.

Over 40% increase in retirement plan participation after the workshops to integrate new acquisitions. Most employees also deferred more than the match into the plan.

No formal complaints to HR following the launch benefits planning programs designed to communicate changes in benefits.

Employee Feedback

Stats

94% of employees who attended a workshop said they took action to improve their finances when surveyed 30 days later.

99% indicated they have a better understanding of their benefits following the education.



"I had my total rewards [meeting], and I have to say it was really good. I was seriously wanting to leave the company in the next year, but I really have much to think about now, I didn't realize how good I really have it benefits wise. I'm actually really glad I work for [the company] in that respect."



"Very informative and explained how the stock market operates. With this understanding I was able to figure out where to place my 401(k) contributions."

"I think I can now safely say I can retire anytime after I reach the age of 55."



"I've used the tools we have to check which plan is best for me."



"This program provided me with the info I needed to assist in making a life changing decision involving my finances & retirement."



About Financial Finesse

Financial Finesse was founded with a single mission: Provide people with the information they need to become financially independent and secure.

Today, we are the leading provider of unbiased financial education programs for large companies and municipalities. Our award-winning content and curriculum covers virtually any financial topic, from debt to estate planning, and can be delivered in multiple formats: in group settings, in person, online, over the phone, and through print materials.



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