SUBJECT LINE: Help your employees with the financial moments that matter

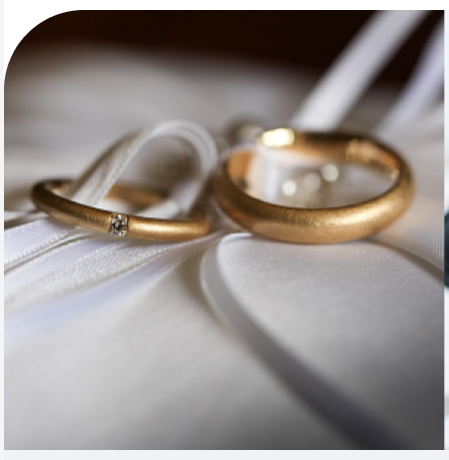
Momentum™ by Edelman Financial Engines®

ACCELERATING FINANCIAL CONFIDENCE
MOMENT BY MOMENT

AN EMPLOYEE BENEFIT WITH A HUMAN TOUCH

All your employees could use professional guidance for the financial demands they face, from hire to retirement.

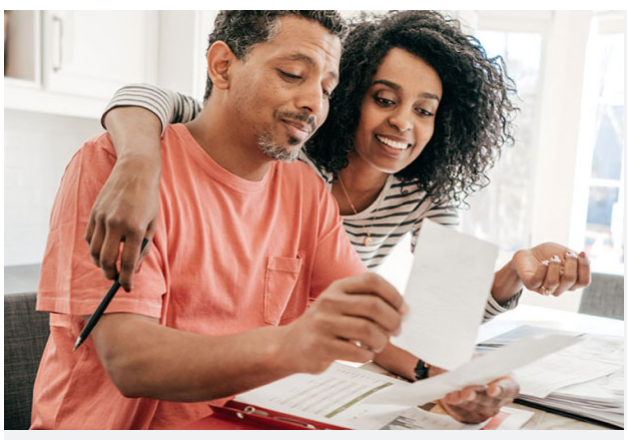
Learn more



Complex financial moments arrive early and surface throughout employees' lives. Some are related to home and others to work. All are highly personal. Momentum by Edelman Financial Engines™ gives employees of any age, ethnicity, income level, gender or background access to experienced financial counselors, digital tools and curated education for all the financial moments in their lives.

Learn more

FEATURES AND BENEFITS

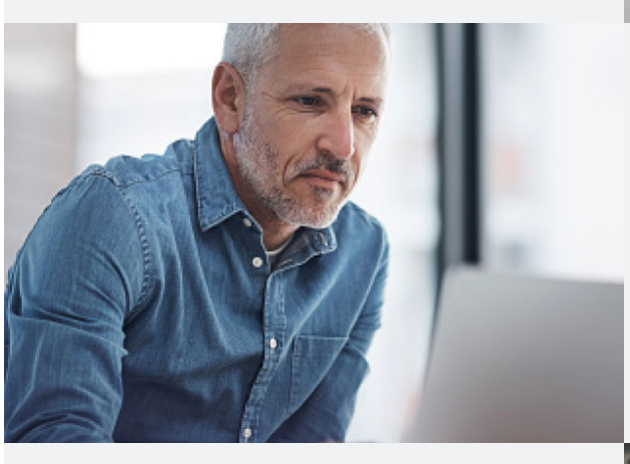


Everyday wealth and wellness

Saving, budgeting, debt management and advanced topics, such as tax strategies, generational planning, insurance decisions, health care, elder care and custom benefits.

Life's financial moments

New hire onboarding includes benefits choices, changes in employment status, retirement counseling and income planning services and equity compensation and grants.



Retirement readiness

Traditional 401(k) online advisory services and discretionary 401(k) professional management with annual retirement checkups with a counselor and retirement income, 401(k) guidance, Retirement Evaluations and Social Security optimization.

Diverse employee needs

Personalized, multichannel experiences designed to address demographic groups with specific needs. Resources include targeted Employee Resource Group webinars and tailored counseling support to drive equitable outcomes and close financial gaps.

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Neither Edelman Financial Engines nor its affiliates offer tax or legal advice. Interested parties are strongly encouraged to seek advice from qualified tax and/or legal experts regarding the best options for your particular circumstances.

Decisions regarding Social Security are highly personal and depend on a number of factors such as your health and family longevity, whether you plan to work in retirement, whether you have other income sources as well as your anticipated future financial needs and obligations.

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