YOUR EMPLOYEES WANT HELP ACHIEVING FINANCIAL WELLNESS

Employees want, need and expect an employee benefit that helps lead them to financial wellness in their personal and professional lives.

85%
of employees would like to direct questions to a licensed professional[1]

80%
of employees would value financial education[1]

79%
need interactive digital tools[1]

LEARN MORE

MOMENTUM BY EDELMAN FINANCIAL ENGINES™

Help your employees achieve financial peace of mind and increase focus and productivity. Momentum is a comprehensive financial wellness benefit to help improve your employees' financial knowledge and confidence. It provides personalized guidance to each employee for every personal and professional financial moment that matters, from hire to retirement.

LEARN MORE

- Live, one-on-one financial counseling and specialized planning sessions with Chartered Retirement Planning Counselor® and Certified Financial Planner® credentialed advisors.
- A dynamic library of curated content, webinars and educational resources
- Digital tools such as calculators to estimate mortgages and retirement needs

GUIDANCE IN FOUR CATEGORIES FOR EVERY EMPLOYEE

EVERYDAY WEALTH AND WELLNESS

- Saving
- Budgeting
- Debt management
- Generational planning
- Insurance decisions
- Health care
- Elder care
- Custom employee benefits

LIFE'S FINANCIAL MOMENTS

- New hire onboarding includes benefits choices
- Changes in employment status
- Retirement counseling and income planning
- Equity compensation and grants

RETIREMENT READINESS[2]

- Traditional 401(k) online advisory services
- Discretionary in plan professional management
- Retirement income
- 401(k) guidance
- Retirement Evaluations
- Social Security strategies and planning

DIVERSE EMPLOYEE NEEDS

- Personalized, multichannel experiences designed to address demographic groups with specific needs
- Employee Resource Group webinars
- Tailored counseling support to drive equitable outcomes and close financial gaps

LEARN MORE

PROFESSIONAL GUIDANCE FOR EVERY MOMENT THAT MATTERS, **WHEN IT MATTERS MOST**

BILL, 26
- Starts a new job
- Guidance about benefits

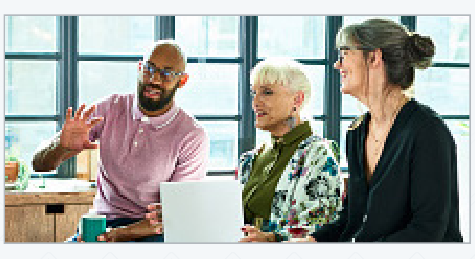
ANN, 31
- Having a baby
- Answers about college savings

AMY, 37
- Receives equity compensation
- What does she need to think about?

KELLY, 48
- Taking voluntary retirement
- Guidance about COBRA
- 401(k) rollover

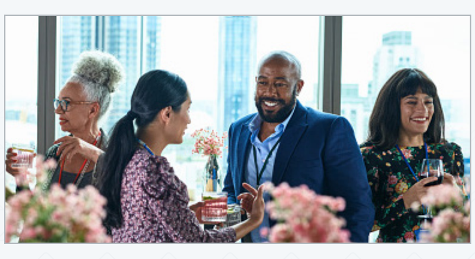
MIKE, 55
- Wants to know about Social Security options
- Social Security strategies

SARAH, 63
- Wants to understand Medicare
- Preparing for Medicare transition



EMPLOYEES OF ALL AGES
Retirement planning and readiness

DIVERSE EMPLOYEES
Individualized experiences tailored to address distinct needs



FOR ALL EMPLOYEES
Accelarate financial confidence

LEARN MORE

LEARN MORE

Submit the form below and one of our Momentum consultants will contact you to listen to what you want in a financial wellness benefit. Momentum can help you fill a void of financial knowledge and guidance. You can help relieve financial stress and improve productivity among your employees.

Learn about Momentum

Full Name

Company Name

Company Size

Email

Phone Number (optional)

Please confirm your information above and an advisor will contact you.

Contact me | By appointment

We take privacy seriously. Read our Privacy Policy.
We don't sell your data. Read our 'Do Not Sell My Info' Notice.

1 Edelman Financial Engines conducted an online survey of America's employees on January 6-25, 2022, focusing on subjective measures of what employees want across 1,075 employees, including 972 retirement plan participants. Qualified survey participants were full-time employees with access to a retirement plan. Aggregate data is reported at 95% confidence with plus or minus 3% margin of error. Fielding was conducted on the Qualtrics Insight Platform. https://marketing-landing-pages.financialengines.io/pdf/Want_Need_Expect_Research.pdf

2 Retirement Readiness services provided through agreement with applicable plan sponsor and subject to recordkeeper integration.

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Edelman Financial Engines, LLC, does not 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.

Investment advisory services including online advice and managed account services for 401(k) investments available to plan sponsors at applicable recordkeepers. Provision of these services subject to definitive agreement.