

Financial Wellness in the Workplace



MONEY + WEALTH EMPLOYEE EDUCATION PROGRAM



GROUP LEARNING

Two powerful presentations on personal finance presented live to your employees via Zoom with interactive Q&A session. Just \$20 per attendee (min \$500 per presentation)

Money Masterclass

Key concepts and best practices that address SHORT TERM financial needs and concerns: "Spend, Save, and Borrow".



Wealth Workshop

Key concepts and best practices that address LONG TERM financial needs and concerns: "Invest, Plan, and Protect".



1:1 EMPLOYEE SUPPORT

Employees gain access to Accredited Canadian Finance Professionals for one-on-one personalized support and expert guidance. (Three pricing options available)

Services provided by Accredited Canadian Finance Professionals



Tanya Oliva, BBA, AFCC

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Founder of Fin\$mart Financial Coaching
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FIN\$MART™
Financial Smarts to Live Your Best Life



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Employees need Financial Education and Support



55% of Canadians are feeling “financially paralyzed”
49% of Canadians are losing sleep due to financial stress
47% of Canadians are living paycheque to paycheque

\$2,000 is the hidden cost per employee due to lost productivity and absenteeism.

MONEY + WEALTH

PERSONAL FINANCE EDUCATION & 1:1 SUPPORT FOR YOUR EMPLOYEES

Employers have a vital role to play in employee financial wellness

It's important for employers to recognize that personal finance challenges experienced by your employees often remain unspoken and can have a significant impact on the bottom line.

Providing financial education and financial wellness support in the workplace is a benefit employees will highly appreciate. Personal finance knowledge and skills can be more valuable than a raise and are proven to generate increased loyalty.

To start the journey to financial wellness in the workplace by offering the MONEY + WEALTH personal finance education series.

The MONEY session is focused on “How to Manage Money for Today” while the WEALTH session is presented is focused on “How to Build Wealth for the Future”.

Each session will include Q&A and a participant survey for employer feedback. Personalized Financial Coaching and Financial Planning support is added as an additional benefit and incentive. We look forward to discussing our various pricing options, including fee per service, group rates on retainer, and as an inclusion with your company's existing health and wellness benefit program.

Your Trusted Partner in Employee Financial Wellness



FIN\$MART™

Financial Smarts to Live Your Best Life