

Fin\$mart Financial Wellness NEEDS ASSESSMENT



Fin\$mart is on a mission to improve the financial wellness of working Canadians. We promise to provide Clarity - *Financial Awareness*, Mastery - *Financial Preparedness*, and Transformation - *Financial Security & Peace-of-Mind*.

Please complete our Needs Assessment so we may have a clearer understanding of our strategic fit and provide valuable insights for our Discovery Meeting.

Let's start with the basics:

Company Name

Website

Short description of your
company

Contact Name

Title

Phone

Email

Please share some details on your employees:

How many employees
do you have?

Approximately, what percentage % of your employees are:

Full Time

Part Time

Contract

Male

Female

Approximately, what percentage % of your employees are:

Gen Z (Age: 25 and under)

Gen Y (Age: 26-40)

Gen X (Age: 41-55)

Boomers (Age: 56 and over)

Approximately, what percentage % of your employees work in each location:

Head Office

Service location

Warehouse or other facility

Work remotely from home

Located in one city

Located in multiple cities/
communities

What employee
HEALTH benefits
and rewards do you
currently offer?

What employee
FINANCIAL benefits
and rewards do you
currently offer?

How has the Covid-19
Pandemic impacted
your company and
business?

How has the Covid-19
Pandemic impacted
your employees?

Please share some insights on your company's DNA:

What three words
best describe your
company culture?

What three words
describe the company's
relationship with its
employees?

How important is
employee health &
wellness to your
company and why?

How important is
employee retention to
your business?

How much of your
employer value
proposition is aligned
with being a
good employer?
What makes it so?

What are you hoping
to achieve by
implementing an
employee financial
wellness program?

We would love to know
a few reasons as to why
we should choose to
work with you?

Please use this space to
share any additional
insights or information.
Thank you!

Please email your completed form to tanya@finsmart.ca.
We look forward to the opportunity of working with you.