

MAKE YOUR MONEY WORK FOR YOU

Schedule Your Free Financial Wellness Consultation

Everyone deserves a financially healthy future. That's why your plan now offers free access to a personal Financial Wellness Consultant from our retirement advisor, Creative Planning. All discussions are confidential, and no information will be shared with your employer.

How it works:

Book your one-on-one appointment at a time that works best for you. Before you meet, consider gathering statements or usernames and passwords for key financial accounts (e.g., your checking/savings account, credit cards, student loans, investments, 401(k)s, IRAs, 403(b)s and insurance policies). It can be helpful to have a summary of the employer benefits you've enrolled in, too.

What's included:



FINANCIAL FOUNDATIONS

- Budgeting
- Emergency savings
- Cash flow priorities



DEBT MANAGEMENT

- Credit scores
- Debt reduction strategies
- Student loan options



BENEFITS OPTIMIZATION

- Insurance coverage
- Tax reduction options (Roths, HSAs, FSAs)
- Retirement readiness
- Social Security and Medicare



WEALTH BUILDING

- Investing
- Tax efficiency
- Estate planning
- Life insurance

To schedule a meeting with your Financial Wellness Consultant, Kyle Andrews, scan the QR code or email kyle.andrews@creativeplanning.com

