



Wellth at Work™

Where Wealth Meets Well-Being™

What Is It?

Wellth at Work™ is a fully-managed financial wellness benefit that gives employees the tools, guidance, and confidence to take control of their finances—without adding more work for HR.

Who Is It For?

This program is ideal for employers, HR leaders, municipalities, nonprofits, and any organization that wants to improve employee satisfaction, reduce stress, and create a thriving work environment.

What's Included?

- Quarterly 1-on-1 Check-ins with licensed financial educators
- Bi-weekly Live Group Classes on Zoom
- 24/7 On-Demand Learning Library
- Emergency Q&A; Drop-In Support
- Quarterly HR Engagement & Impact Reports

Pricing Options

Employers can choose to fully sponsor the program, cost-share, or offer it as a voluntary benefit. Plans start at just \$5/employee/month or \$20/month if employee-sponsored.

How We Work

We don't push products—we deliver help first. If an employee requests more personalized assistance with things like retirement planning or insurance, we're licensed to help through our affiliated entities—always optional, never pressured.