



## Wellth at Work™ Sample Employer Report

### Overview:

This sample report illustrates the anonymized quarterly engagement summary your HR team will receive. It captures employee participation metrics, common financial wellness themes, and recommended next steps.

### Q2 Employee Engagement Summary:

- 74% employee participation
- Most-attended session: 'Budgeting Basics & Beating Debt'
- 1-on-1 Check-Ins: 43 total, with 17 ongoing action plans created

### Trending Topics:

- Managing high-interest debt
- Building emergency savings
- Preparing for retirement (403b, SEP IRA, Roth, etc.)

### Suggested Follow-Ups:

- Offer additional drop-in office hours during open enrollment
- Highlight on-demand resources around debt reduction
- Continue bi-weekly group classes—focus on investing next quarter

### Reminder:

Wellth at Work™ is non-product-based. No sales pitches, no financial jargon. Just trusted help, employee-driven support, and real results you can track.