



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 financial wellness consultation, scan the QR code
or call 844.569.5442.



Creative Planning, LLC, does not guarantee that the results of their advice or recommendations or the objectives of an investment option will be achieved. All investments involve risk, including the loss of principal. There can be no assurance that any financial strategy will be successful.

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