

MAKING CENTS

EMPLOYEE FINANCIAL WELLNESS

*Personal Guidance.
Real Impact.*

Financial planning shouldn't be reserved for the *wealthy*.

Give your employees access to professional financial guidance they might not otherwise receive.



1



EDUCATE

ENGAGING
PRESENTATION

A practical and relatable financial wellness session for your employees.

2



PERSONALIZE

PRIVATE 60-90 MINUTE
CFP® SESSION

Each participating employee meets one-on-one to create their personalized financial plan.

3



ACT

A TANGIBLE
STARTING POINT

With a completed personal budget in hand, employees have the necessary foundation and next steps for financial clarity.

More than a conversation.

Every employee leaves their first session with a personalized financial plan — a clear look at their current financial picture and practical next steps across key areas including:



Cash Flow
& Budgeting



Debt
Management



Saving
& Investing



Major
Life Goals



Insurance
& Protection



Retirement
Planning

Confidential coaching reduces employee stress and improves their financial well-being.
Confident employees are more focused, engaged, and productive.



STACEY L. ZRIHEN, CFP®, ABFP®

Stacey is a financial advisor with over 20 years of experience. A graduate of the University of Pennsylvania, Wharton School of Business, she has coached thousands of clients and leads financial wellness seminars across the US and Canada.