

Holistic Financial

Holistic Financial Wellness Program

Financial wellness reduces employee stress, improves overall physical health, emotional health, and increases productivity... all of which help both your business and your employees thrive.



24% of workers admit to being distracted by financial stress at work.

We don't disappear after enrollment day. We are here for you and your team every step of the way.

Quarterly Education

We kick off your financial wellness program with presentations on subjects that are pertinent to your retirement plan and overall financial health.

Session 1

- **Your Peppermint Pooled Employer Plan** (Details of the PEP)
- **Allocation Review** (Overview of the value of allocation & diversification)

Session 2

- **Equities and Bonds** (Overview of general investment options)
- **Opening an Investment Account** (Steps to open an additional account)

Session 3

- **Retirement & Taxable Accounts** (Differences between investment vehicles)
- **Cash Reserve** (Review of an "appropriate cash reserve")

Session 4

- **Financial Planning** (Planning for key events - college, mortgages, etc.)
- **Legacy Planning** (Introduction to wills/trusts and long-term planning)

Finance Fridays – Ongoing education and support

Our investment advisors provide one-on-one Q&A sessions available to all employees on the first Friday of each month. During these informal, virtual conversations, employees have a chance to individually discuss specific questions and finance-related topics with a partner from Grey Fox Wealth Advisors.

