

Good for your employees and your business.



DISCOVER FINANCIAL WELLNESS



# Good for Your Employees. Good for Your Business.

When employees are financially sound and physically healthy, everyone benefits. Investing in the programs necessary to educate employees on financial issues will provide invaluable results. The resulting outcomes go beyond benefiting only the employee. Employers and families are positively affected as well. Employees will strengthen relationships and improve physical health while discovering a sense of confidence and increased self-esteem. Employers should benefit from lower health care costs, increased productivity, greater company loyalty and improved “retirement readiness”. With financial education everyone wins—and the benefits to both the employees and the employers are substantial.



## Benefits

### employers

Benefits to employers for providing health and financial wellness benefits may include:

- Increased job productivity
- Reduced health care costs
- Reduced turnover
- Improved company loyalty
- ROI estimates of \$2 to \$5 for every \$1 spent on financial education
- Increased benefit utilization and appreciation
- Increased bottom line!

### employees

Benefits to employees for providing financial wellness benefits:

- Lower stress levels
- Improved personal financial situations
- Improved personal health
- Improved personal relationships
- Increased self-esteem and sense of confidence
- Improved employee review

## What We Do

Through a comprehensive service offering, We improve employee financial wellness and physical wellbeing by reducing stress levels, while also improving productivity, company loyalty and healthcare costs—all of which translates into an increased bottom line. We strive to improve employees' financial literacy which produces better employees for the employer. Our broad service offering meets the needs of a diverse employee population.



## How We Do It

By working closely together with the company, we improve attitudes and behaviors associated with financial wellness through education, tools and advice. We develop a strategy that best fits the company and its employees. These action strategies allow employees to take control of their personal financial situations and pursue their goals, benefiting the company and the employee. All of this is done through a number of programs, tools and services.

# Mission

To improve employees' personal financial behavior and knowledge, while increasing physical well-being, resulting in an enhanced bottom line for the company.

# Services

## Comprehensive Financial Education

- Live and web-delivered comprehensive workshops
- Live one-on-one educational meetings
- Comprehensive e-learning programs

## Retirement Plan Education and Advice

- Custom GAP analysis and annual statements for plan participants and non-participants
- Online investment education and calculators
- Advice/recommendations for changes to improve retirement strategy

## Health Wellness

- Comprehensive health wellness program
- Health and financial wellness integration
- Efficient program administration and seamless participant experience

## Ancillary Programs

- Credit counseling

## Who we are and what we do.

The EDSA Group and Iota's passion and proficiency come from our vast resources, collective experience, and recognized expertise in financial education. Even before research confirmed, the connection between financial health and personal well-being was clear. The impact that financial stress had on the individuals, their relationships, families, jobs and employers was staggering. As a result, it has been our goal to impact behavior, helping employees, their families, and bringing an unmatched value to employers. Over time, we developed a broad service offering to meet the challenges employers face and to bring clients the education they seek.

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