

## Financial Planning Tools

*Offering planning resources where they're needed*

Employees make many of their most important financial decisions through the workplace. BCI's trained Benefit Counselors, innovative tools and communication techniques help guide employees through financial choices in order to become better consumers.

### Customer Value

- Reduces absenteeism: 37 percent of HR managers “agree” or “strongly agree” that employees have missed work due to a financial emergency in the last 12 months.<sup>1</sup>
- Increases productivity: 57 percent of employers agree offering financial education to employees has a positive effect on productivity.<sup>2</sup>
- Forty-nine percent of employees who don't have access to financial education through the workplace would be interested in the opportunity.<sup>3</sup>

### Advantages

- Shows employer investment in employee's financial well-being
- Drives awareness and creates guidance for decision making
- Encourages more educated and confident decision making
- Increases participation in defined contribution plans

“**90% of workers say financial considerations would be most important if they or a family member became seriously ill.**”

### Delivery Options

- Onsite one-on-one meetings with trained Benefit Counselors
- Call center one-on-one meetings with trained Benefit Counselors
- Web portal/Intranet/Kiosk
- Paper/Fulfillment
- Video
- Social media
- Mobile applications

<sup>1</sup> Society for Human Resource Management, “2014 Employee Financial Stress Survey,” June 2014.

<sup>2,3</sup> MetLife, “U.S. Employee Benefit Trends Study,” 2014.

Contact BCI's Marketing Department to find out more about our financial planning tools.

**Marketing@benefitcommunications.com**

**1-800-489-3786 ext. 613**

**www.benefitcommunications.com**

