

Financial Wellness Benefit for Your Employees

Engaged plan participants improves employee confidence, productivity, and job satisfaction

Provide a best in class financial wellness benefit to your employees to lower turnover, attract top talent, and keep defined contribution plan fees low.

NewRetirement is an advanced financial planning and management platform, combining innovative technology, insights, education, and community designed for a person's entire life. Employees who are more engaged in their financial planning are more likely to trust communications from their record keeper and employer.

Retirement planning across every life stage

- From early career to early stage retirement
- Help employees build confidence in their financial wellbeing
- Assess value of Roth conversions

Digital coaching and online educational materials

- Podcasts, videos, articles
- Real time education and coaching
- Online group training

Employees get a holistic view of their financial situation

- Add all assets to plan: home value, savings, other income sources, and many others
- View a timeline of total net worth
- Model long-term impact of increasing or changing contributions
- Create an expense budget

Positive impact for employers

- Increase employee confidence and job satisfaction
- Reduce absenteeism and turnover
- Differentiating recruitment benefit
- Keep defined contribution plan fees low

“ People who are less engaged in their retirement account are less likely to trust communications from their recordkeeper and employer ”

