FINANCIAL WELLNESS PROGRAM

Financial education resources tailored to your organization's unique goals and objectives.

WENRICH WEALTH

FINANCIAL WELLNESS PROGRAM

Happy and healthy employees are good for business.

As an employer, you design your employee benefits program to help keep your employees healthy and productive, but did you know that *financial stress* is a major contributor to poor physical health?

*Individuals with high levels of financial stress are more likely to suffer from depression, headaches, sleep issues, substance abuse, and a host of other mental and physical ailments.

This creates a negative feedback loop that can be difficult to overcome.

Unfortunately, financial literacy and personal finance education is severely lacking in schools and homes across the country.

In addition, traditional financial education programs may not be effective at managing the behaviors that cause financial stress.

We work with your organization to design a program that meets your employees where they are in life. We offer interactive training that helps employees gain confidence in their ability to make important financial decisions.

Every organization is different, and every employee is different. Your Financial Wellness Program should be tailored to the urgent and pressing needs of your employees. For that reason, we build a program that addresses the specific needs of different groups.

* 2016 https://www.shrm.org/resourcesandtools/hr-topics/benefits/pages/employees-financial-issues-affect-their-job-performance.aspx

Seeking to understand.

Programs are designed to meet the unique goals and needs of your organization and your employees. There is no “one size fits all”.

Our curriculum and workshops are designed to connect with and inspire students of all ages and socioeconomic backgrounds.

TOPICS COVERED

- Financial Psychology
- Loans, Debt & Credit
- Emergency Funds
- Investing
- Income Planning
- Tax Planning
- Savings, Expenses & Budgeting
- Risk Management & Insurance
- Retirement Planning
- College Funding
- Kids and Money
- Wills and Estate Planning

THE PROGRAM BUILDING PROCESS

Foundation Phase

- Discovery
- Define
- Design

Program Phase

- Pre-Programming
- Implementation
- Post-Programming

Follow-Up Phase

- Measurement
- Feedback
- Re-Discovery

A TEAM COMMITTED TO YOUR UNIQUE GOALS

At our firm, the focus is on our clients and our community.

No one strategy fits everyone, which is why every client gets our undivided attention—from planning to execution to follow-up. We take a proactive approach to helping you develop a strategy to address your financial goals and objectives, using the most efficient methods available.

At Wenrich Wealth, we help clients work toward their goals by focusing exclusively on their needs, values, and objectives. We endeavor to provide top notch service at every opportunity and keep our clients needs top of mind.

Our process revolves around goal setting, planning, and execution. We help clients identify, prioritize, and pursue the goals most important to them.

J. J. Wenrich CFP®
President
Wealth Manager
JJ.Wenrich@lpl.com

WENRICH WEALTH

160 Avenida Granada
San Clemente CA 92672

(949) 325 - 8325

www.WenrichWealth.com

Jodie Wenrich
Client Service Manager
Jodie.Wenrich@lpl.com