



Living Paycheck to Purpose

Financial Empowerment Program for Employees



Financial education and tools are not enough. We are the only workplace program designed to help employees address the root causes of their financial struggles so they can better align their financial choices with their purpose and most important life goals.



We speak with your employees not to your employees. Workplace Money Coach is turning financial wellness programming on its head by ditching the traditional PowerPoint lecture model and introducing a group coaching format. We encourage employees to take ownership of their financial lives and empower them to make lasting changes to their behaviours when managing their money.



When employees win financially, so does your bottom line. Upon completing the program, employees leave with clear financial goals and report lower levels of money-related stress, increases in savings and 401K participation, and being optimistic about their financial future. This sense of financial wellness has been linked to improved productivity, reduced distractions, increased engagement, and enhanced organizational commitment.



The personal touch. Every employee has a unique past, present and future money story and we offer one-to-one financial coaching as an option for program participants so they can get individual attention to help them thrive in their financial lives.

Workshop Descriptions

Week 1: Create Your Vision of Financial Success

Kick off the program with motivation to help you better understand where your financial journey is taking you. Finding your "Why" is an integral part of building healthy and sustainable habits for managing your money.

Week 2: Develop Your Financial Plan

Introduction to the Six Simple Steps to Financial Freedom - the backbone of the Workplace Money Coach program. Financial empowerment begins with a goal, a plan, and some motivation to get you started.

Week 3: Take Control of Your Paycheck

A budget is the "golden tool" for reaching one's financial goals. Introduction to a variety of budgeting methods and tips to help individuals take control of their spending and reallocate their income toward their financial goals.

Week 4: Build Wealth and Live Your Best Life

Explore wealth building and creating passive income so that your hard-earned money can go to work for you. Highlights a variety of ways one can invest to create income and build wealth.



Benefits of our unique group financial empowerment model



No two programs are the same.

Our live, 4-week program facilitates thought-provoking activities and interactive discussions that are unique to each employee group so participants can address their personal financial goals and hurdles.



Our program doubles as a cross functional team training exercise as employees from different divisions of your company **join together to share ideas and cheer each other on** as they learn how to win with money.



We create an environment that allows employees to share financial experiences, tools, books, applications and knowledge with coworkers to **magnify the impact of the program** exponentially.



Pricing

4-week Living Paycheck to PurposeSM Financial Empowerment Program

\$1500 facilitator fee + \$29 per participant (registration and materials).

Additional cost of travel may apply.

Ex: 15 participants: $\$1500 + (15 \times \$29) = \$1935$

Add Individual Financial Coaching For Program Participants

Add two 30-minute coaching sessions for each participant for \$75/participant.

Ex: 15 participants: $\$1935 + (15 \times \$75) = \$3060$