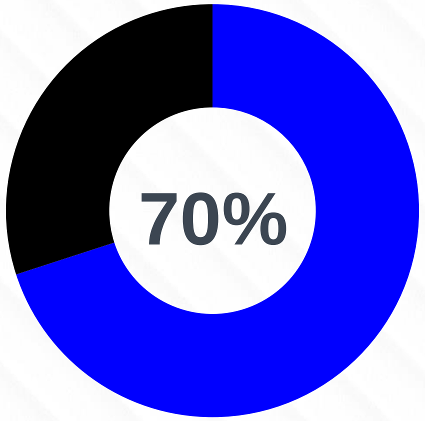
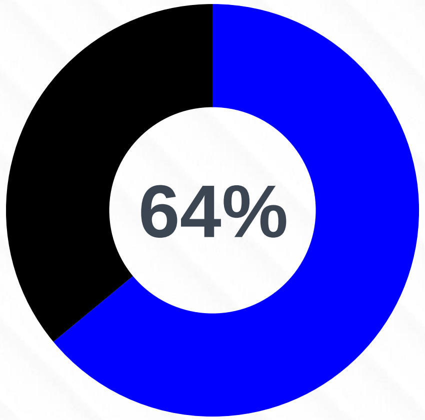
DRIVE

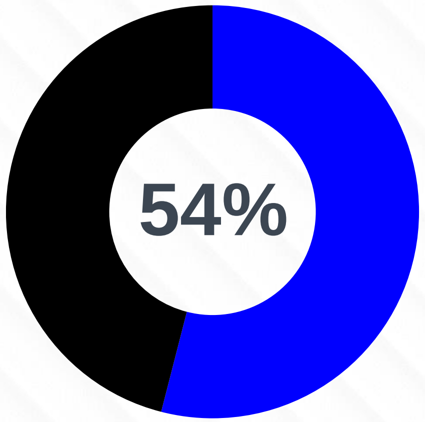
2022 NATIONAL CONFERENCE



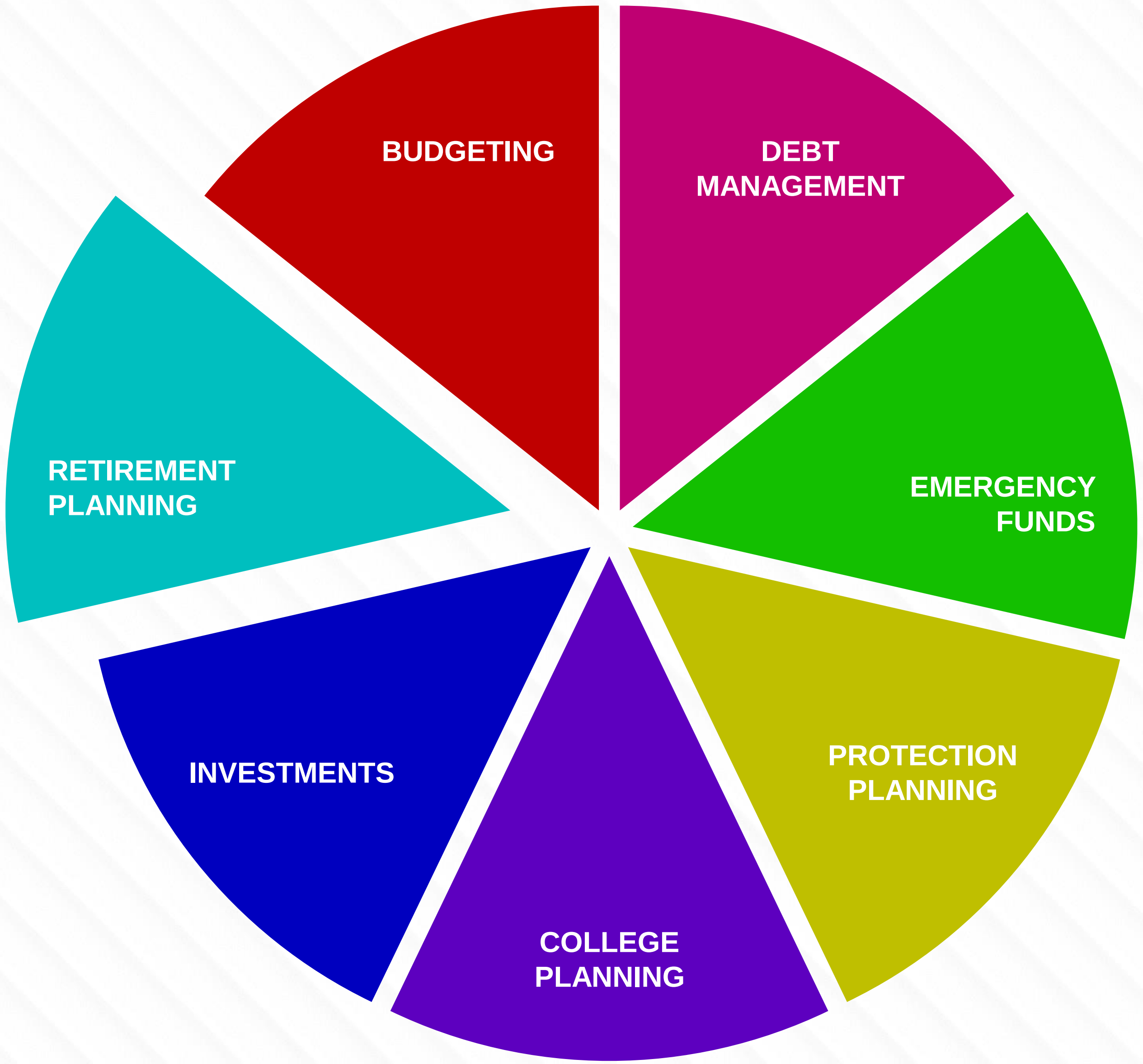
Americans that live
paycheck to paycheck[1]



Americans that **can't cover a $1,000 emergency** without borrowing money[3]



Americans that are **not getting financial advice**[2]



1. 2017, CareerBuilder, Living paycheck to Paycheck is a Way of Life for a Majority of U.S. Workers
2. 2017, Mercer, Inside Employee's Minds™: Volume 2
3. 2017, Mercer, Inside Employees' Minds™: Volume 2

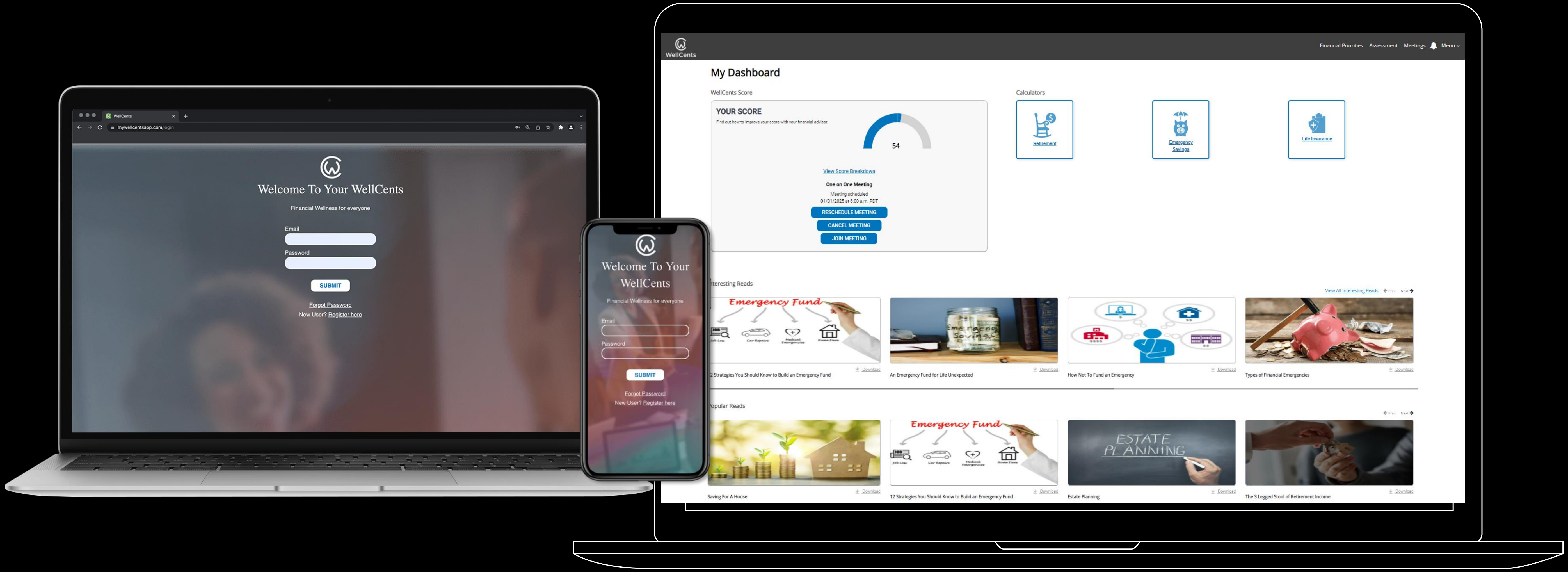
PURPOSE

WellCents was created to:

- Inspire employees to develop financial confidence
- Remove barriers that prohibit employees from making good financial decisions

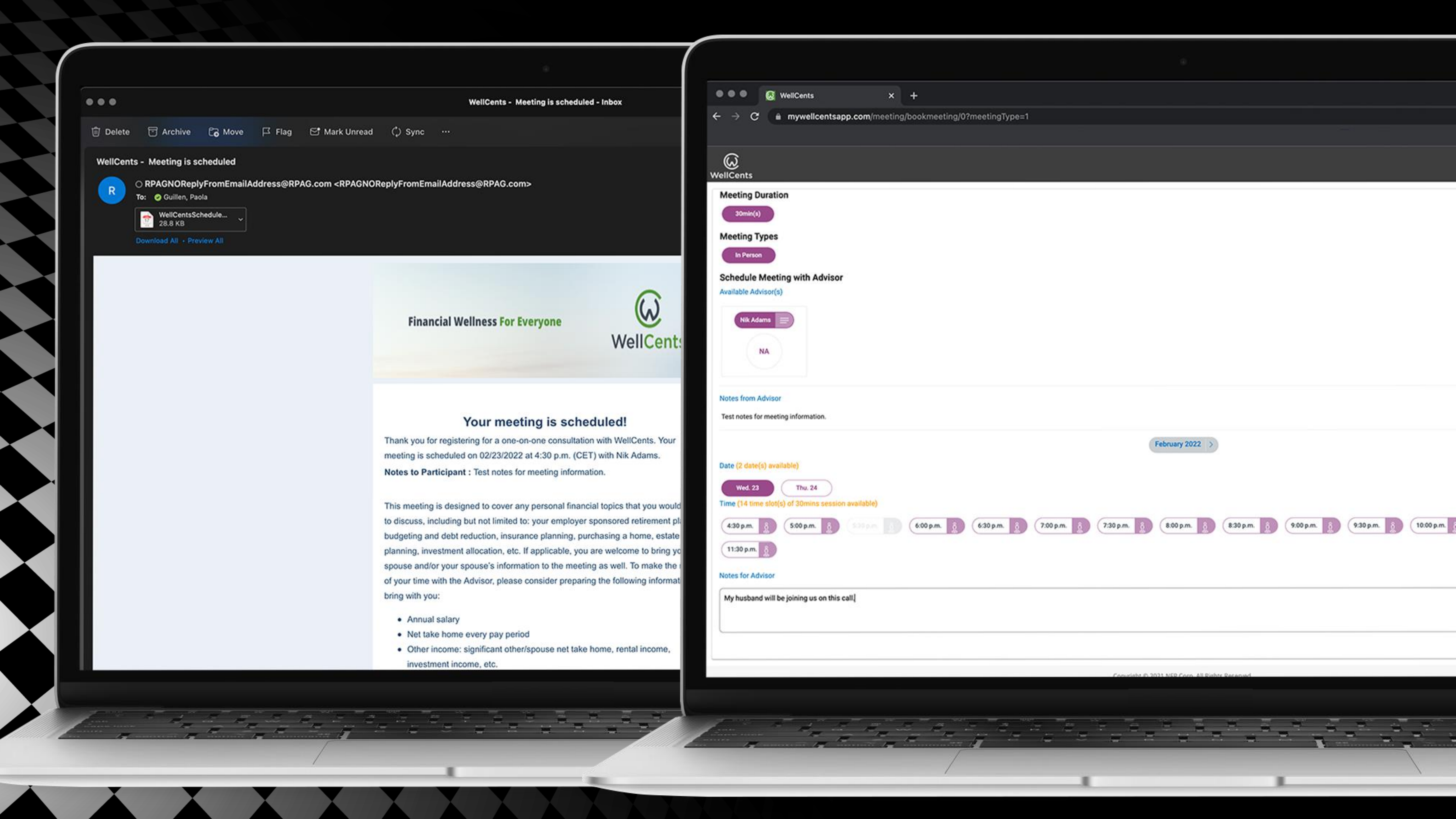
WHY WELLCENTS MATTERS

- Employees struggle with prioritizing their current and future financial needs which creates financial stress
- Financial stresses distract employees and negatively impact an employer's mission and/or bottom-line
- Most employees don't have the resources to access to coordinated financial and benefits planning advice
- Developing financial confidence across your workforce leads to loyal, happy and more productive employees



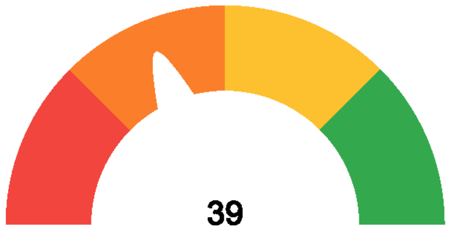
R P A G

DRIVE '22



WellCents - Meeting is scheduled - Inbox
Delete
Archive
Move
Flag
Mark Unread
Sync
WellCents - Meeting is scheduled
RPAGNOReplyFromEmailAddress@RPAG.com <RPAGNOReplyFromEmailAddress@RPAG.com>
To: Guillen, Paola
WellCentsSchedule...
28.8 KB
Download All • Preview All
Financial Wellness For Everyone
Your meeting is scheduled!
Thank you for registering for a one-on-one consultation with WellCents. Your meeting is scheduled on 02/23/2022 at 4:30 p.m. (CET) with Nik Adams.
Notes to Participant : Test notes for meeting information.
Annual salary
Net take home every pay period
Other income: significant other/spouse net take home, rental income, investment income, etc.
WellCents
mywellcentsapp.com/meeting/bookmeeting/0?meetingType=1
WellCents
Meeting Duration
30min(s)
Meeting Types
In Person
Schedule Meeting with Advisor
Available Advisor(s)
Nik Adams
NA
Notes from Advisor
Test notes for meeting information.
February 2022
Date (2 date(s) available)
Wed. 23
Thu. 24
Time (14 time slot(s) of 30mins session available)
4:30 p.m.
5:00 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.
9:30 p.m.
10:00 p.m.
11:30 p.m.
Notes for Advisor
My husband will be joining us on this call.

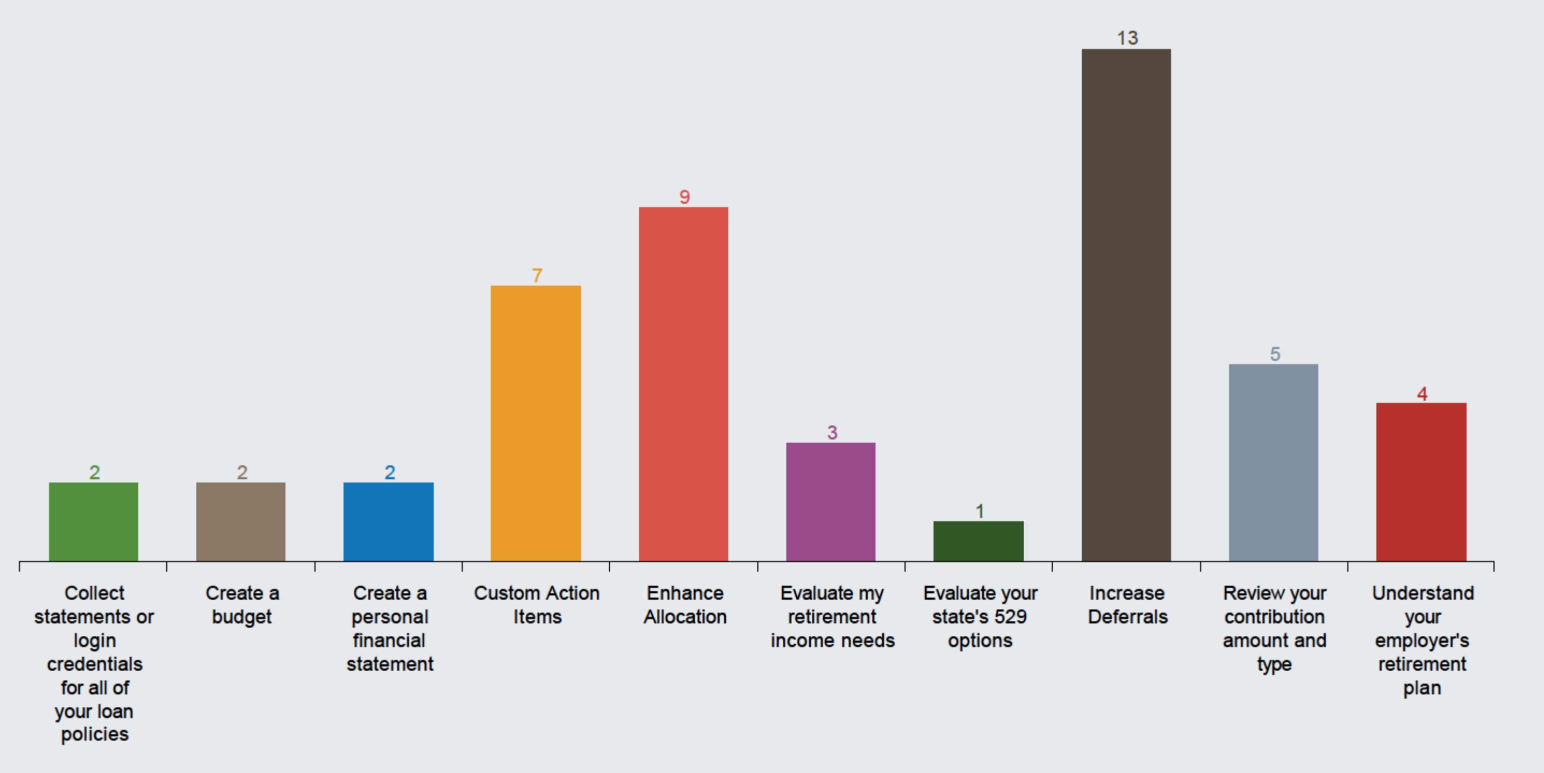
SUMMARY



AVG. WELLCENTS SCORE

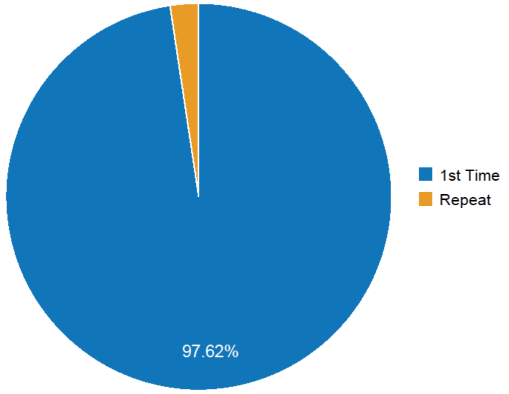
Personal Finance	52
Investment Planning	39
Retirement Readiness	26
Protection Planning	39
Total Average	39

ACTION PLANS AND NEXT STEPS

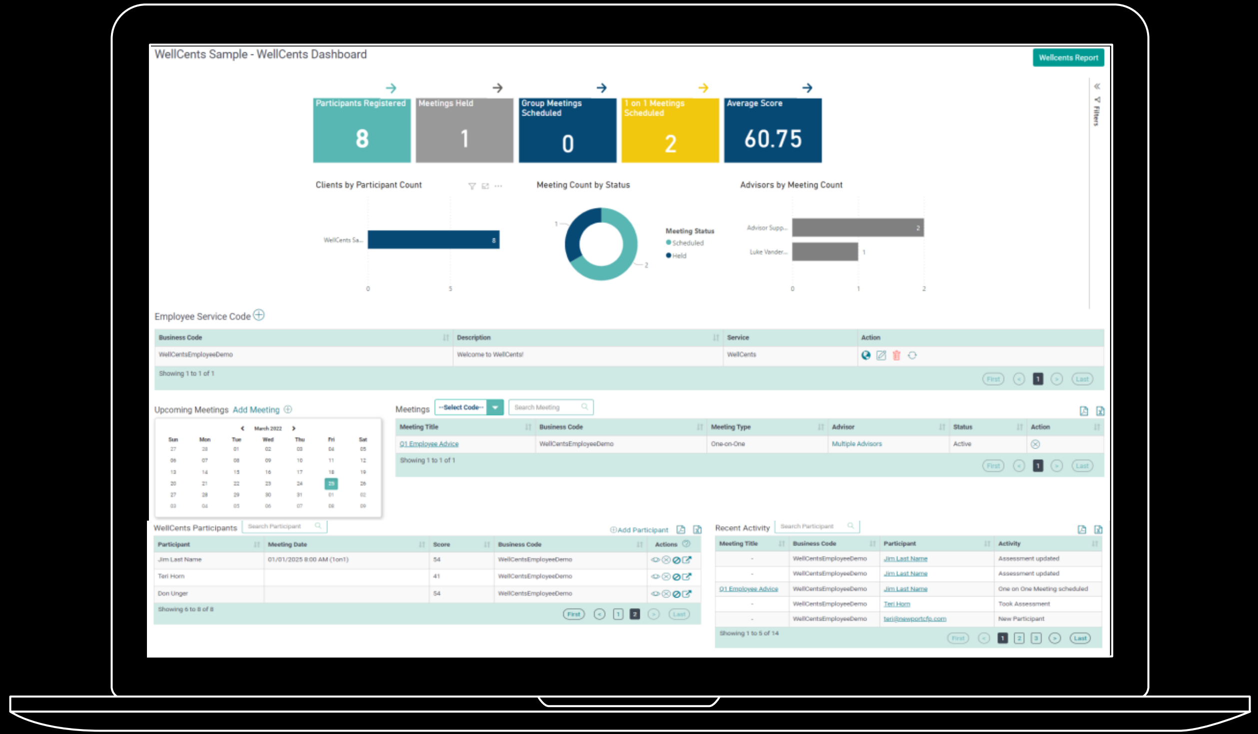


MEETING SUMMARY

IN-PERSON MEETINGS	VIRTUAL MEETINGS	GROUP MEETINGS
0	43	4



2 employees registered for a meeting but did not attend.



RPAG

DRIVE '22

PAY DOWN/PAY OFF DEBT **183**	RETIREMENT INCOME PLANNING **143**	ESTABLISH AN EMERGENCY FUND **135**
HELP WITH BUDGETING **118**	BUYING/REFINANCE A HOME **112**	SAVE FOR A LARGE PURCHASE **40**
SOCIAL SECURITY/MEDICARE PLANNING **36**	PROPERLY MANAGE MY INVESTMENTS **27**	OPTIMIZE TAX EFFICIENT SAVINGS **22**
COLLEGE SAVINGS **20**	EVALUATE MY INSURANCE NEEDS **19**	ESTATE PLANNING **13**

PANEL

Vital℠ VITAL PLANNING GROUP

WeinerBenefits GROUP
we work for your benefit

Burak N. Alpaslan, CFP®, AIF®

Co-Founder | Partner

Louis D. Memmolo, AIF®

President

COMING SOON

WELLCENTS DASHBOARD UPDATES

CUSTOM DISCLOSURE CAPABILITIES

ENHANCED ADVISOR MEETING SETTINGS

USER EXPERIENCE UPDATES

UPDATED PARTICIPANT ACTIVITY FILTERS

ADDITIONAL SCHEDULING CALENDAR OPTIONS

1 ON 1 MEETING FOLLOW UP AND SURVEY

YEAR 2 REPORTING ENHANCEMENTS

THANK YOU!

WellCents

Luke Vandermillen Jr.

Sr. New Business Development Associate

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