

# RPAG Wellness™ Financial Wellness

Next-Gen Financial Wellness



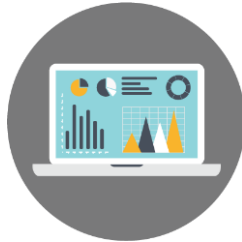
RPAG Wellness

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## RPAG Wellness



**Participant  
Dashboard**



**Scheduling  
Tool**



**Benefit  
Advisory**



**Action  
Planning**



**In-Person  
Education**



**Virtual  
Education**



**Employer  
Reporting**

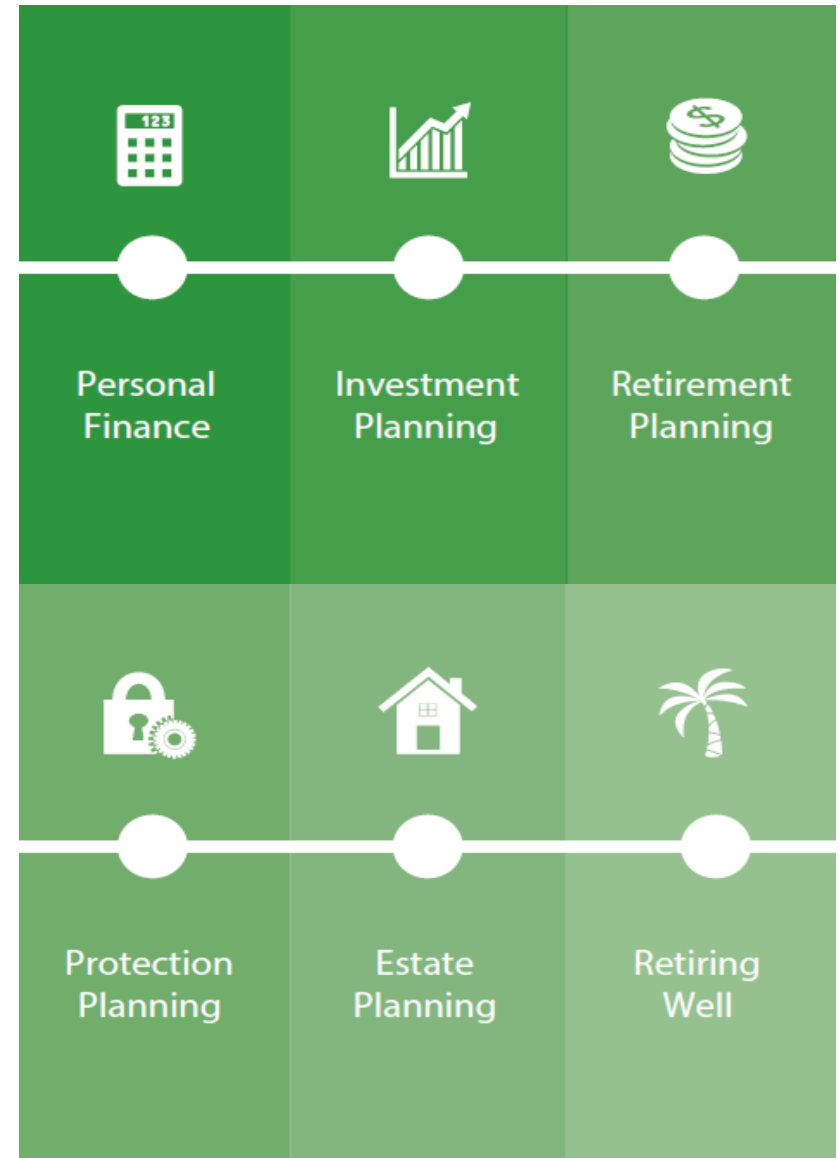
# RPAG Wellness Platform



RPAG Wellness

A holistic budgeting, saving, insurance, investment and retirement income planning program

- Sessions include 1-on-1 and group meetings that can be conducted in-person or remotely
- Content is delivered via a team of Certified Financial Planners® and other financial advisors
- Users can schedule 1-on-1 meetings directly with their advisor or with Wellness staff
- Personal financial assessments and planning guidance are provided to maximize a participant's limited benefits budget
- Includes robust participant assessment and activity dashboards that cover various components of savings, spending, debt, and risk management



# RPAG Wellness Modules

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## Personal Finance

- Managing Spending
- Creating a Budget
- Reducing Debt
- Emergency Savings
- Time Value of Money

## Protection Planning

- Risk Management Basics
- Health Insurance
- Disability Income Insurance
- Life Insurance
- Property and Casualty Insurance

## Investment Planning

- Setting Investment Goals
- Identifying Time Horizons
- Understanding Risks
- Identifying Risk Tolerance
- Benefits of Diversification

## Retirement Planning

- Retirement Income Basics
- Social Security Basics
- Retirement Income Needs
- Retirement Savings Goals
- Distribution Planning

## Retiring Well

- Longevity
- Fixed Expenses
- Variable Expenses
- Social Security and Medicare
- Retirement Income Solutions

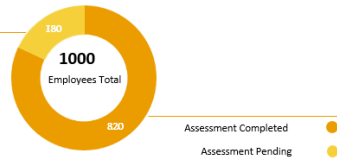
## Estate Planning

- Estate Planning Basics
- Probate
- Wills and Trusts
- Gifting
- Advance Directives

# RPAG Wellness Dashboards

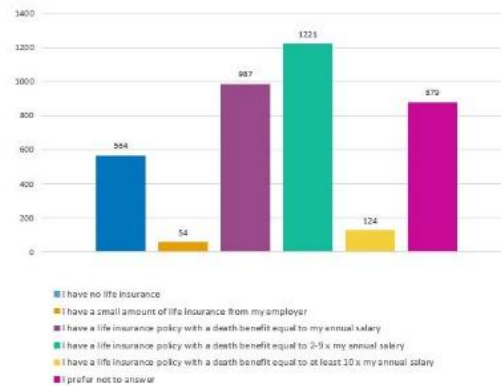
## Participation

820 Assessments Completed  
by 1000 Employees  
for a 82% Participation Rate



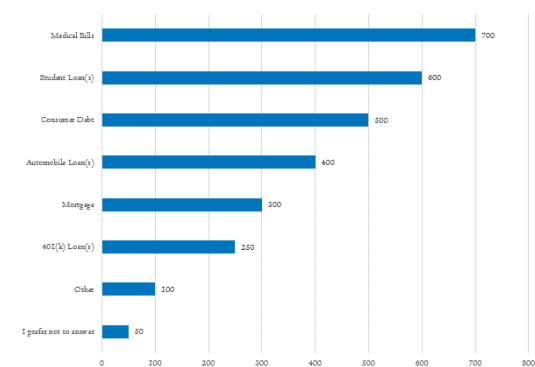
## Protection Planning

How would you describe your life insurance situation?



## Personal Finance

What kind of debt, ranked from most to least burdensome

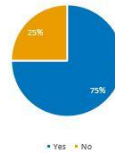


## Scoring

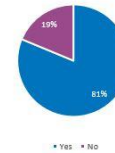


## Investment Planning

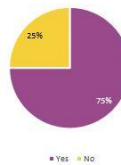
Have you already started saving for retirement?



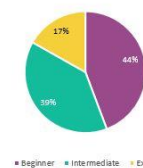
Are you confident your investments are allocated properly?



Have you obtained investment advice from a financial professional?

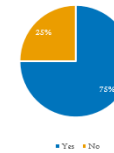


How would you describe your investment knowledge?

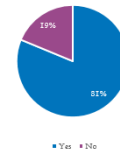


## Retirement Planning

Do you know if you're saving the correct percentage of your salary to meet your retirement goals?



Have you tried to calculate how much is needed for retirement?



How much of your current income are you saving for retirement?



# Disclosures

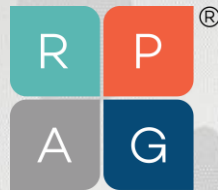
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# Thank You



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