



## WellthSource<sup>SM</sup> : Financial Wellness for the Digital Age<sup>SM</sup>

As the world’s leading EAP provider, ComPsych® is zealous about meeting people “where they are” and breaking down barriers to accessing financial resources. That is why we have developed WellthSource<sup>SM</sup>, an interactive financial wellness product that helps employees and their family members create and manage a well-planned, flexible and sustainable lifestyle of healthy financial habits.

Available on desktop, tablet and mobile platforms, this needs-based digital program addresses all of the most common financial issues and topics in an engaging and user-friendly format. By gauging each user’s comfort level across an array of financial subjects, WellthSource<sup>SM</sup> uses its proprietary resource recommendation engine to help individuals prepare and sustain a healthy financial lifestyle.

No matter an individual’s goal or stage in life, WellthSource<sup>SM</sup> can provide users with the tools needed to create and maintain financial well-being.

WellthSource<sup>SM</sup> builds guided programs focused on a variety of financial topics, such as:

- Banking, budgeting and saving
- Homeownership and mortgages
- Debt, credit and loans
- Investing and retirement
- Taxes, charity and government
- Child, family, pet and health
- Identity, security, scams and fraud
- Financial and estate planning

### How It Works

1. WellthSource<sup>SM</sup> asks about the user: The WellthSource<sup>SM</sup> program guides each user through an interactive assessment, which asks them to rate their comfort levels around key financial categories. This assessment, paired with other information collected during site registration, becomes the basis for their financial quotient or “Fi-Q” score—the starting point of every user’s financial journey.
2. WellthSource<sup>SM</sup> builds a personalized curriculum: Using our state-of-the-art resource recommendation engine, the WellthSource<sup>SM</sup> platform builds a personalized, guided financial wellness program featuring a tailored set of resources and content, such as webinars, articles, podcasts, quizzes, slideshows, and on-demand trainings—to address the user’s individual issues and improve their overall financial well-being.

### The ComPsych® Difference

- Needs-based, interactive digital platform creates a personalized financial wellness curriculum for each user
- Convenient online and mobile access to thousands of state-of-the-art financial tools and services
- Easy-to-follow digital modules to create a legally binding will and personalized financial plan
- Access to ComPsych® dedicated staff of impartial, in-house CPAs, CFPs and other financial experts
- Available stand-alone or as a value-add complement to GuidanceResources® services

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3. Users complete the curriculum at their own pace: The goal of each program module recommended by WellthSource<sup>SM</sup> is to improve the individual's comfort level and decrease their overall stress and anxiety around each financial subject. Some of these resources are core financial building blocks from which everyone can benefit, while others are tailored to the individual users' needs based on the information they provided during their initial assessment. As users complete the activities recommended by WellthSource<sup>SM</sup>, their "Fi-Q" scores increase alongside their financial knowledge.

### Additional Resources, Services and Tools

The WellthSource<sup>SM</sup> platform includes numerous additional tools and resources, such as the FinancialPoint<sup>®</sup> digital planning tool, EstateGuidance<sup>®</sup> online will preparation module, budget calculators, a resource library with thousands of helpful assets, and a financial news and live markets section, which is available to participants at any time. If a user needs to talk to someone, live help is available around-the-clock to assist individuals with anything from finding resources and tools for dealing with financial stress, to scheduling a consultation with one of our certified financial professionals.

### FinancialPoint<sup>®</sup> Digital Planning Tool

FinancialPoint<sup>®</sup> offers a simple-to-follow online process that makes it easy for individuals to create a personalized financial plan. Users are given step-by-step instructions to complete the online data-gathering and personal investment viewpoint questionnaires. A FinancialPoint<sup>®</sup> expert reviews the individual's responses, corresponds directly with them for additional information or questions and provides a detailed, customized personal financial plan.

### EstateGuidance<sup>®</sup> Online Will Preparation

EstateGuidance<sup>®</sup> helps individuals secure their financial future by providing tools and guidance to overcome the legal, financial and emotional barriers to writing a will. This economical, user-friendly tool guides individuals through the process of creating a last will and testament, as well as a living will and final arrangement documents. EstateGuidance<sup>®</sup> walks users through the documentation process and breaks each step down into easy-to-understand terms.

EstateGuidance<sup>®</sup> offers three services:

1. Last Will and Testament - the central component of every estate plan
2. Living Will - outlines end-of-life medical decisions
3. Final Arrangements - specifies burial or cremation preferences; funeral or memorial service options

### About ComPsych<sup>™</sup>

ComPsych<sup>®</sup> Corporation is the world's largest provider of employee assistance programs (EAP) and is the pioneer and worldwide leader of fully integrated EAP, behavioral health, wellness, work-life, HR, FMLA and absence management services under its GuidanceResources<sup>®</sup> brand. ComPsych<sup>®</sup> provides services to more than 56,000 organizations covering more than 127 million individuals throughout the U.S. and 190 countries. By creating "Build-to-Suit" programs, ComPsych<sup>®</sup> helps employers attract and retain employees, increase employee productivity and improve overall health and well-being. For more information, visit [www.compsych.com](http://www.compsych.com).

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