

**We offer a range of products and services for the benefit of both your employees and your company**

## **Employee Education:**

- ✓ Book
  - *Your Retirement Quest* provides employees with the concepts and tools they need to plan the non-financial aspects of a fulfilling retirement
  - Many companies provide a book to their most experienced employees
  - 25% volume pricing discount
- ✓ Life Planning Workshops
  - We will customize our core workshop for you to meet your employees and your business needs
- ✓ Highlights Video
  - You can provide access to this 45-minute life-planning video to employees
  - You get a link to a page that is customized to welcome your employees to YOUR page, and you get a personalized password to provide your employees with access
  - Engaging video describes the key concepts and tools of retirement life planning

## **1-1 Program for Key Employees**

- ✓ On-line in-depth Retirement Readiness Assessment
  - Through Keith Lawrence's certification as one of but a few certified retirement life coaches, we have access to this proprietary on-line retirement readiness assessment tool
- ✓ Personal Coaching
  - Use of the tool by a key employee is followed up by a personalized debriefing session and coaching to develop a meaningful retirement life plan
  - We will customize our core workshop to help you further differentiate yourself with these companies as a financial firm that cares about their employees holistically, not just about their money

## **Customized Programs for your Company**

You can think about the products/services described above as a menu from which to choose to best suit your particulate business objectives and plans. We will work with you to best meet your needs and those of your employees.