

FINANCIAL WELLNESS ASSESSMENT



1. As a whole, do you feel like your employee population is concerned about their credit scores?

- A. Yes (5 points)
- B. No (0 points)

4. Do you regularly process wage garnishments?

- A. Yes (0 points)
- B. No (5 points)

2. Are more than 50% of your employees exceeding the match?

- A. Yes (5 points)
- B. No (0 points)

5. True or false: Our employees would embrace or have embraced an HSA healthcare plan?

- A. True (5 points)
- B. False (0 points)

3. Do more than 10% of your employees have an outstanding 401k loan?

- A. Yes (0 points)
- B. No (5 points)

6. Do your employees live paycheck to paycheck?

- A. Yes (0 points)
- B. No (5 points)

- A. 30 pts
- B. 20-25
- C. 15
- D. 10
- F. 0-5

My company's financial culture assessment grade is:



Ready to bring up that score?

Feel free to reach out to Pete at programs@petetheplanner.com or by calling 317-762-3240