

BCC & PATHWISE

Maximize Engagement By Integrating Financial Wellness

Financial wellness matters to employees. Studies show that **4 of 5 employees** report wanting personalized financial support from their employer and **90% of employees** say that financial benefits that target their individual needs would help them to feel more invested at work. Financial wellness isn't just a "nice to have" employee benefit, it's a critical component of your recruiting, retention, wellness and training strategy.

BCC can help you reach and educate your workforce in financial well-being through our integration with Pathwise Group.



One-Stop Shop For Personalized Financial Wellness

You work hard to build a benefits package that supports your employees in times of need and for the long-term. You want to ensure employees are getting the most from your benefits, but there are some topics like personal finances that you're not qualified to address.

BenXcel's Pathwise Financial Wellness integration provides valuable information to make smarter training and benefits decisions, while offering employees personalized financial support.

- ✓ Collect valuable information about what your employees need help with, regardless of location or shift.
- ✓ Target personal financial training and support to your employees at the times they need it most.
- ✓ One location for all things benefits by logging into BenXcel and tapping into the Pathwise system.
- ✓ A robust financial wellness program means less work for your HR team.
- ✓ Employees get a personalized, year-round education and engagement.
- ✓ Valuable insights for HR uncovers gaps in current benefit offerings.

INDIVIDUALIZED EMPLOYEE ASSESSMENT

64%

VOLUNTARILY
COMPLETED THE TOOL

35%

DIRECTLY BOOKED
A MEETING

25%

BOOKED A MEETING AFTER
RECEIVING TAILORED
EDUCATION CONTENT

How It Works

The process for employees is simple. And an easy process for employees means a great experience.

Personal scorecard

Employees complete a 3 – 5 minute assessment within the BenXcel platform. The software analyzes and employee's unique financial situation and immediately gives them a personalized financial wellness score with a simple red, yellow, green rating.

Opportunity to book a private appointment

From there, employees have the opportunity to book a complimentary meeting with a personal financial planner where they get one-on-one support.

Different interventions based on needs

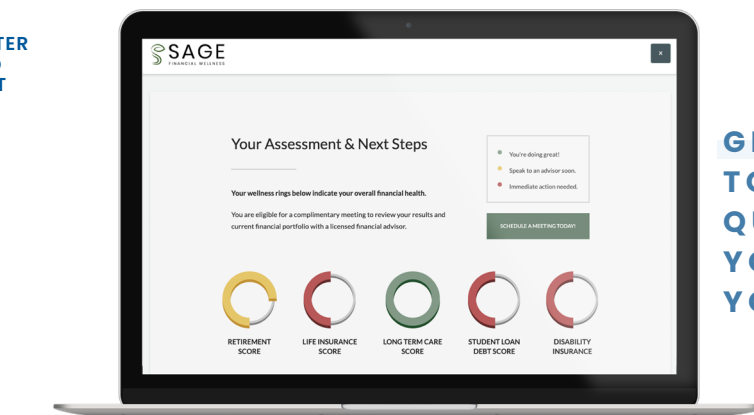
The system automatically sets users up with the right financial planner based on the needs identified in their assessment.

Smart education keeps employees engaged year-round

Employees receive on-going, year-round education and support that fills in gaps, drives engagement with your benefits package, and delivers the personalized guidance they need for financial security.

Getting Started Is Easy

Personal finances are one of the biggest stressors facing your employees today. With the global pandemic still smoldering and inflation soaring, your employees are losing sleep and productivity worrying about and dealing with financial struggles.



**GET IN TOUCH
TODAY TO SEE HOW
QUICKLY AND EASILY
YOU CAN SUPPORT
YOUR EMPLOYEES.**

