

RCM&D RETIREMENT SERVICES

FINANCIAL FINESSE

Backed by the industry-leading programs of Financial Finesse, RCM&D delivers effective, independent and award-winning Financial Wellness benefits to all of our clients. Our offerings allow every company to deliver a successful benefit tailored to their unique budget and needs.

	SERVICES INCLUDED		
	Tier 1	Tier 2	Tier 3
Financial Finesse Hub	✓	✓	✓
Financial Wellness Assessment	✓	✓	✓
Workforce Financial Wellness Assessment	✓	✓	✓
Marketing & Promotion		✓	✓
Client Success Support		✓	✓
Phone-Based Financial Coaching		✓	✓
Webcast Subscription			✓

ENTERPRISE FINANCIAL WELLNESS

AVAILABLE SERVICES



Financial Finesse Hub

- » Mobile-optimized online platform.
- » Central interaction point for employees to access all financial wellness services in one place.



Financial Wellness Assessment (FWA)

- » Five-minute assessment gauging financial habits and behaviors.
- » Provides a score, personal action plan and educational resources.



Consolidated Workforce Financial Wellness Assessment (WFWA)

- » Your team receives a comprehensive analysis to gauge employees' financial wellness.
- » Identifies key vulnerabilities for your team to focus on with additional turnkey educational content.



Unlimited Phone-Based Financial Coaching

- » On-demand access to CFP® professionals employed as full-time financial coaches.
- » Integrates seamlessly with the advice you provide participants as part of your practice.
- » Drive users to the Hub for continued engagement.



Marketing, Promotion & Client Success Support

- » Marketing materials, automated email campaign, flyers and promotional collateral.
- » Access to employee presentations and workbooks for employee meetings.
- » Client Success Manager to share ideas, analytics, and implementation ideas.



Webcast Subscription

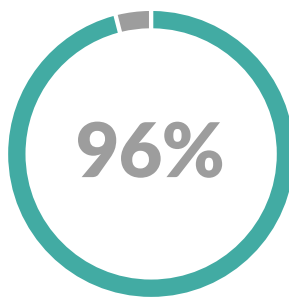
- » 12 interactive, one-hour group coaching sessions facilitated by Financial Finesse Certified Financial Planner™ professionals.
- » Monthly webcasts covering the most widely requested topics by employees.

WE MEASURE ROI IN BEHAVIOR CHANGE

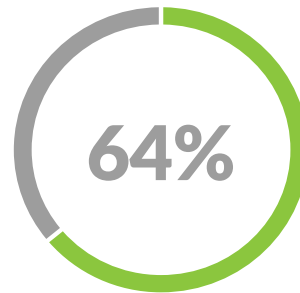
Our ongoing personalized coaching creates the accountability that drives participants to take action.

Behavioral Change

Percentage of users taking action(s) to improve their finances 30 days after participating in Financial Finesse's program.



1 Change



2+ Changes

Top 3 Actions Are:

1

Reduce credit card debt

2

Review retirement plan asset allocation

3

Utilize calculators & resources

Questions? Talk to a trusted advisor.

rcmd.com | 800.346.4075

All information provided in this brochure is provided directly by **Financial Finesse** and is subject to change.



RCM&D is ranked among the top independent insurance advisory firms in the United States. Our specialized teams provide strategic solutions and consulting for risk management, insurance and employee benefits. Leveraging more than 135 years of experience and strong local, national and global reach, we partner with you to meet all of your business objectives.



Baltimore, MD | Washington, DC | Richmond, VA | Philadelphia, PA | Harrisburg, PA