Paving the Path to Financial Wellness

Navigating finances in today's world can be overwhelming. These resources from ComPsych® can give you the confidence and peace of mind you deserve.

WellthSource℠ : Financial Wellness for the Digital Age℠

An interactive financial wellness resource that helps employees and their family members create and manage a well-planned, flexible and sustainable lifestyle of healthy financial habits.

Wellthsource℠ Builds Guided Programs Focused on a Variety of Financial Topics:

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

Additional Resources, Services and Tools

The WellthSource℠ platform includes numerous additional tools and resources, such as the FinancialPoint® digital planning tool, EstateGuidance® 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.

FinancialPoint® Digital Planning Tool

FinancialPoint® offers a simple-to-follow online process that makes it easy for individuals to create a personalized financial plan, reviewed by a FinancialPoint® expert who can offer advice and guidance.

EstateGuidance® Online Will Preparation

EstateGuidance® helps individuals secure their financial future by providing tools and guidance to overcome the legal, financial and emotional barriers to writing a will. EstateGuidance® 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**

FinancialConnect®

Provides Direct Access to Experts and Unlimited Financial Information

The ComPsych® FinancialConnect® staff provides individualized, objective guidance on a broad range of personal financial issues, including:

- **Debt Management**
- **Retirement Programs**
- **Money Management**
- **Insurance**
- **Family Budgeting**
- **Real Estate**
- **Estate Planning**
- **Credit Problems**
- **Tax Questions**
- **Investment Options**
- **Lease vs. Buy**
- **Bankruptcy**
- **Mortgages, Loans and Refinancing**

24/7 Live Assistance:
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TRS: Dial 711

Online: guidanceresources.com
App: GuidanceNow℠
Web ID: CHUBB

ComPsych® GuidanceResources® Worldwide