

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.



WellthSourceSM : Financial Wellness for the Digital AgeSM

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.

WellthsourceSM 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 WellthSourceSM 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:

Call: 844-266-0712

TRS: Dial 711



Online: guidanceresources.com

App: **GuidanceNowSM**

Web ID: **CHUBB**



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