



So how does it work?

After meeting with your employer, we will then visit the workplace to deliver our Financial Wellness Initiative to employees in a relaxed and informal setting. We can present either a group seminar or meet with each employee on a one to one basis, or a combination of both.

What's Employee Feedback like?

Previous employee feedback shows the overwhelming response is extremely positive. Not only the sense of empowerment and understanding employees have of previously unknown issues but less stress as a result.

Why Lifestyle Financial Planners?

By choosing Lifestyle Financial Planners, employees benefit from access to a Board Certified Financial Planner CFP®, the world's most widely respected financial planning designation and Qualified Financial Advisors. We are one of a small number of firms in the West of Ireland to have a CFP® professional on board and among a select few firms nationwide with the experience and technical knowledge of delivering these Financial Wellness Programmes.

"We were first introduced to Paul by our accountant over 15 years ago, and throughout that time all of our dealings with him have consistently exceeded our expectations. We have previously recommended friends and colleagues to Paul and will continue to do so in the future".


Dr. John McHugh
Castlebar

"Paul has been advising me on my finances since 2005. He has always shown himself to be both diligent and honest and continuously puts my needs first. Paul is one of my trusted advisers I am very happy to recommend.....".

Ciaran Bruen
Senior Software Engineer, BIS, Zurich

Lifestyle
Financial Planners

**IF YOU FEEL YOU OR COLLEAGUES
OF YOURS COULD BENEFIT FROM OUR
EMPLOYEE FINANCIAL WELLNESS
PROGRAM, PLEASE FEEL FREE TO
CONTACT US FOR MORE INFORMATION**

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Lifestyle
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EMPLOYEE FINANCIAL WELLNESS

A comprehensive Financial Wellness Approach for employees, just like you!

Are financial issues causing you concern? Are you confused about all the financial jargon you have to deal with? Do you struggle with trying to understand your pension and retirement options? Are any number of other financial issues keeping you awake at night? If so, you may take some small bit of comfort from knowing you're not alone! More than half (53%) of employees are stressed dealing with their financial situation. 1 in 3 admit to being distracted at work*. Most employees say that financial stress is their most common form of stress**. Numerous other studies confirm similar findings.

*Source-PWC April 2017 report.

** Source-Citizens Advice UK 2016



At Lifestyle Financial Planners, our goal is to give you peace of mind and a roadmap to financial control for the future. According to the 2017 PWC Survey, financial wellness means freedom from financial stress, and being prepared for life's emergencies.

- ✔ Did you know that Financial Wellness not only improves your financial health but your physical health too. Numerous studies point to the fact that increased stress leads to an increase in stress-related symptoms and poor health.
- ✔ We cover off any financial issues that are causing you concern. We show you simple guidance measures, that can help.
- ✔ Financial jargon for most people can be confusing, if not overwhelming. Our program gives you the employee relevant information in plain, simple English.
- ✔ For many employees, pensions and their retirement options are confusing. With ever changing retirement age limits and increased life expectancy, getting clear information to understanding your options is more important than ever.
- ✔ The very fact of having this unbiased 2nd opinion on hand in the workplace to bounce things off, gives you, the employee a sense of comfort and security.



At Lifestyle Financial Planners our "Employee Financial Wellness Programme" has proven to be an invaluable resource.

Benefits for you;

- ✔ Relaxed meeting on a one-to-one basis, on issues that are causing you financial worries or stress
- ✔ Engagement at the workplace, so no time off work
- ✔ Tax, mortgage, retirement, budgeting and a myriad of other tips
- ✔ A sense of empowerment
- ✔ An employer sponsored programme so no cost to you, the employee

Even employees who believe they are already financially competent, will often experience a sense of comfort by having an unbiased second opinion, sometimes reaffirming their views, sometimes not!

If any of the above sounds familiar, our Employee Financial Wellness Programme may be ideally suited to you!

