



*Taking a personal interest
in your financial well-being*

Financial Wellness in the Workplace

This two hour, hands-on workshop will engage, educate and empower business owners and employees to take steps to enhance their financial health. This workshop will have participants reflect upon, and create forward momentum around aspects of financial health.

We will unpack:

- ❖ Benefits of financial health.
- ❖ Creation of participant's personalized version of financial health.
- ❖ Complete and discuss a Financial Satisfaction Survey™, then generate action steps for SMART goal setting.
- ❖ Qualitative components of financial health
 - Where do financial mindsets, attitudes and behaviors come from and what can we do to redirect what is not working or build upon successes.
- ❖ Quantitative components of financial health
 - Creating a spending plan – Give your dollars a job!
 - Goal setting – Managing tension between today and tomorrow
 - Financial tools – understand what you have and how to use them
- ❖ Accountability opportunities – Working together to create new conversations
 - Your ideas and next steps.

Investment: \$500.00 + material expenses (\$10.00 pp < 50; \$8.00pp >50), as well as travel expenses if location is outside of the Roaring Fork Valley. Additional expenses will be situationally discussed and contractually agreed upon in advance.

Contact Molly McMahon at Wealth By Design 970-927-3909 or admin@wbd4u.com to make arrangements or for additional information.

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