



HR SERVICES

Financial Wellness Vendor Selection

USI identifies financial wellness vendors that provide individualized consultation with financial planners to relieve employee stress and improve financial well-being.

- 60% of full-time employees are stressed about their personal finances¹. Employers are negatively impacted by reduced productivity, increased absenteeism and turnover.
- 56% of financially stressed employees spend over three hours a week at work dealing with or thinking about issues related to their personal finances.
- USI has established preferred partnerships with financial wellness vendors that offer:
 - Access to Certified Financial Planners (CFPs)
 - Personal finance education curriculum with financial assessments for both household and personal expenses
 - Savings and budgeting tools and resources

Improving Financial Wellness Scores

Before After



Financial wellness is defined as confidently progressing towards financial goals and creating a clear plan to achieve them.

Impact and Benefits:

- Providing employees with personal finance education and tools supports higher employee loyalty, increased productivity, and better employee retention.
- 83% of participants report a decrease in financial stress after one year of participating with a financial wellness program.

Holistic Approach to Financial Wellness

1. PWC, [PwC's 2023 Employee Financial Wellness](#), 2023.