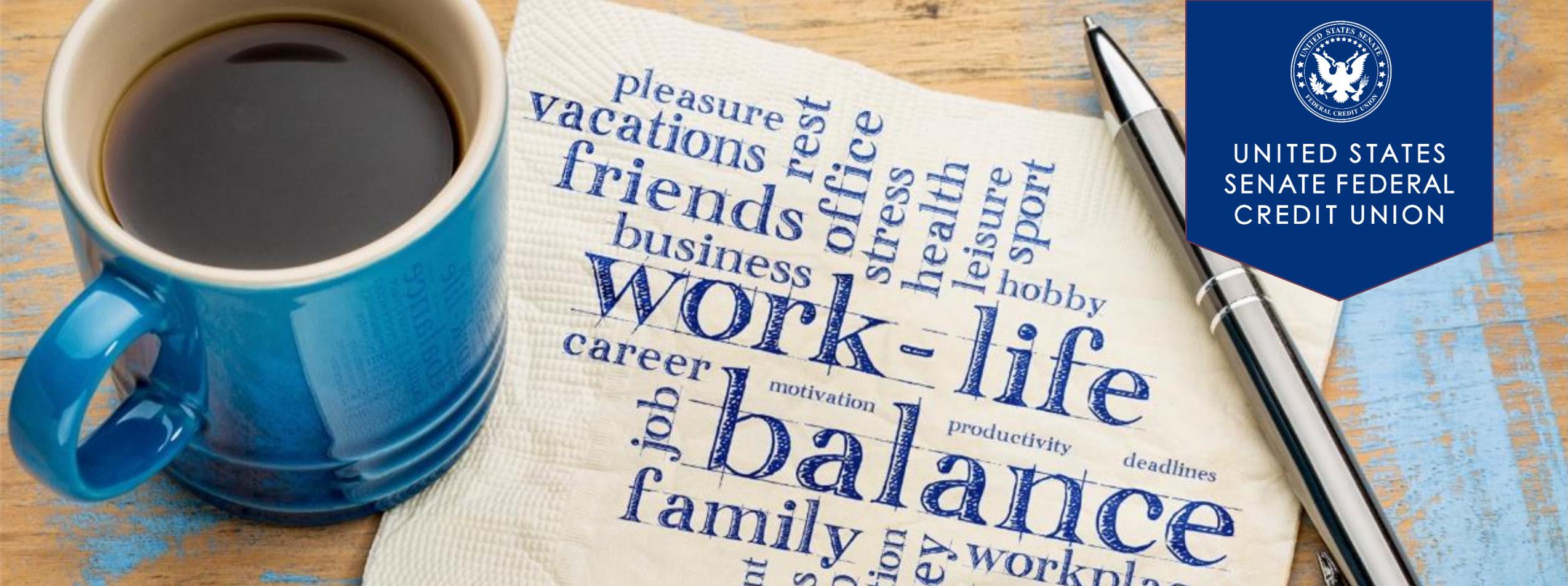




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WORK. LIFE. MONEY.

Creating a Well-Balanced Financial Plan

More Energized, Less Spent

You'll know you have achieved a healthy balance between **work, life and money** when you have energy for all parts of your life.



Work: More than a Paycheck

- Routine
- Social
- Challenging
- Measurable



A group of people in a meeting, with a woman in the foreground looking thoughtful and others in the background holding up sticky notes.

**Which comes first,
success or happiness?**

Life Personal Strategies

Improve your work-life-money balance now



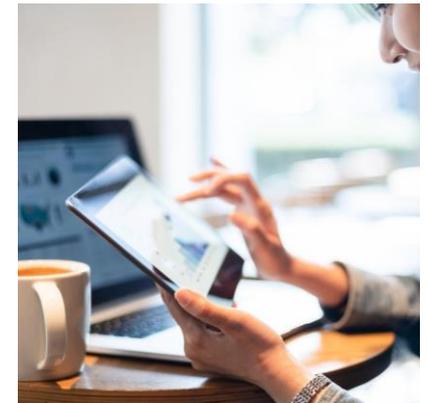
Build downtime
into your
schedule



Eliminate what
doesn't make
your life better



Get moving to
reduce stress



Automate your
finances



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Why Do Finances Count?



3 Great Money Habits

1. Calculate your financial well-being score
2. Regularly review your personal finances
3. Keep the big goals in sight and on track

#1

Financial Well-Being Score

Six Key Areas:

1. Finances
2. Goals
3. Wellness
4. Retirement
5. Family
6. Security

#2

Review Personal Finances

Cash Flow

- Money in/money out

Net Worth

- What you own – what you owe

#3

Keep Big Goals on Track

The awareness of the **important things** in your life that you really **want to do** and **experience**.



Your Financial Plan:

- Driven by your choices
- Organizes finances
- Guides your financial future
- Supports big goals, now and future



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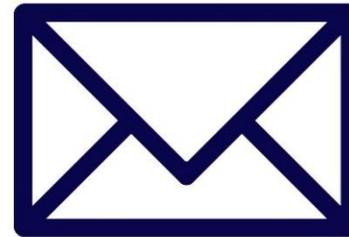
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