



Financial Consulting

Available through your EAP!

As your EAP, we are experts on helping people with their work/life balance. We know that there are many factors in our personal lives that can bleed over into our work life. Our kuleana is to help employees and their immediate family members with these issues. In addition to providing counseling and support for these work/life issues, we also some **FREE** and **CONFIDENTIAL** assistance to those impacted by financial stress. We know that the stress of money issues impacts physical health, work performance, family stress, and more. And we know there is a social stigma associated with money issues that makes it hard to reach out for help. So we have provided these **FREE** and **CONFIDENTIAL** benefits to you in case you need them!

Financial Consultation

Your EAP provides telephonic access to financial professionals for any of our covered employees who are concerned about their financial well-being. Due to a substantial and increasing demand for cost-effective financial advisory services, your EAP has developed a program to assist individuals in resolving their financial issues. The financial component of the EAP benefit program provides access to financial experts with a broad range of experience in financial services, including licensed CPA's and experienced financial advisors.

What It Does:

Each covered employee is entitled to one (1) free 30-minute telephonic consultation for financial coaching. Call and we will connect you to an expert who can give you education, guidance, suggestions, and support. You have an opportunity to confidentially talk with an individual who is familiar with complex financial matters and discuss the most appropriate way to handle your financial situation. If you could benefit from a private discussion with an expert with experienced financial insight, or would like a second opinion to feel confident about a particular financial strategy or decision, please consider an EAP financial referral.

Consultation topics include, but are not limited to:

- Budgeting Techniques
- College Funding
- Corporate Bonds
- Credit After Bankruptcy
- Credit Cards with Lower Interest Rates
- Credit Repair Scams
- Credit Reports
- Debt Counseling
- Divorce Planning
- Insurance Buying Strategies
- IRA Rollovers
- Late Utility Bills
- Medicaid & Medicare
- Mortgages
- Retirement Planning
- Reverse Mortgages
- Saving For Financial Emergencies
- Social Security Benefits
- Small Business Financing
- Student Loans
- Tax Issues
- U.S. Savings Bonds

We go the extra mile to exceed our members' expectations. We are here to help our members every step of the way — helping you with your work, your life, and your work-life balance! Call us to arrange a free, confidential consultation.



Examples of how employees use the service:

- Developing a Spending Plan
- Rebuilding Your Credit
- Getting Out of Debt
- Pre-Retirement Analysis
- Home Buying Strategies
- College Planning

Additional money coaching is available at a discounted rate should employees wish to receive additional support.

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