

Empowering your employees with education & guidance

Wealth Navigators Educational Seminars

Objective

- Educational financial seminars presented to company employees within an interactive worksite setting
- Provide education and guidance regarding complex financial topics in an easy to follow format
- Help workforce take control of their financial future

Why offer Education and Guidance?

The combination of these services is beneficial for both plan sponsors and plan participants

Plan sponsors gain:

- Enhance services to your workforce by helping them navigate through the challenges of retirement.
- Empowering employees through educational seminars by understanding potential financial risks which can help to increase overall satisfaction within the company

Plan participants gain:

- Basic knowledge of financial issues critical to personal finances and retirement planning
- A financial strategy that reflects their personal goals and resources
- Access to a team of financial professionals
- Control over the process: every step is optional and undertaken at the individual's discretion

3-Step Program



Own Your Financial Vision

Key Features

- High quality, customizable financial education
- Wealth Navigators coordinates all promotion and workshop registration
- Personalized one-on-one meetings
- Financial services tailored to the employee's specific goals and needs
- Superior service verified by regular customer satisfaction surveys

Questions

Answers

Who is Wealth Navigators?

Wealth Navigators is a New Jersey based financial planning and investment management group that is experienced in planning, protecting, and allocating assets for executive, families, and business owners. Their focus is on providing clients with the highest level of service, innovation, and stewardship

Are employees members obligated to purchase anything?

No. Employees can attend our seminars for the pure benefit of an educational experience. Individuals have the option for a free personal consultation to discuss his/her unique situation. There are no obligations to purchase anything or even pursue a relationship with a Wealth Navigators team member.

What does it cost and how do I start?

Wealth Navigators educational seminars are available at no cost and can be implemented immediately. Contact us today.

