

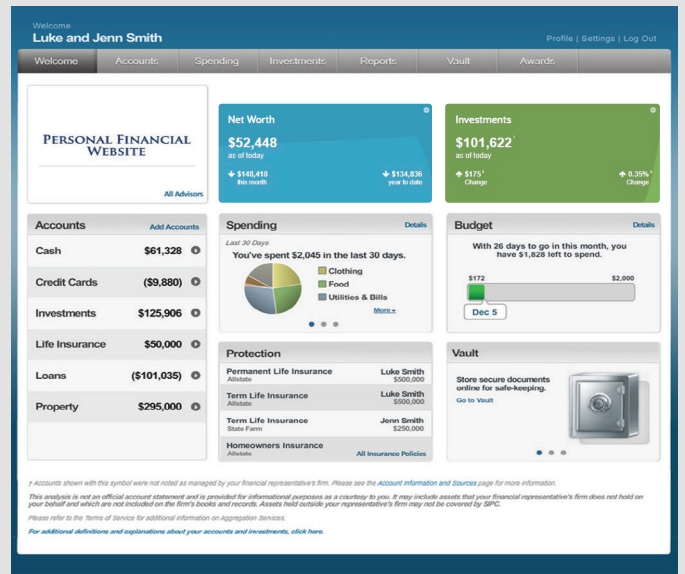
Voluntary Financial Planning Wellness Benefit

Presented by Blakely Walters

Maximize Your Finances and
Reduce Your Stress
Only \$10 Per Pay Period!



- 3 meetings in person or remotely per year
- Ongoing phone & email contact with your personal advisor
- Portable services/Benefits include:
 - Setting financial goals
 - Retirement planning
 - 403(b) investment planning
 - Cash flow analysis/Budgeting
 - Debt management
 - Risk management/Insurance planning
 - College funding strategies
 - Beneficiary review and maintenance
 - Advisement on other financial topics



Includes your own planning website to help you organize and analyze your finances all in one place.

- View all your accounts in one place
- All balances updated daily
- Store financial documents online
- Track and categorize spending
- Compare spending vs. budget goals
- View consolidated investment allocations
- Generate reports with a click
- Schedule appointments online

Sign up and schedule a meeting today.

(480) 776-5897 www.blakelywalters.com

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