

# CG SUPRT Financial Wellness

Stress less and save more with your personal financial wellness program

Get the resources you need to feel confident about your financial goals in any stage of life. To get started, visit [cgsuprt.com](http://cgsuprt.com), click the "Financial" tile, then select "Financial Coaching", or call 1-855-CG SUPRT (247-8778).



## MONEY COACH

- Professional, unbiased, confidential, trustworthy
- Average experience – 22 years
- No sales environment – focus is on helping you
- Address financial goals, challenges & life events
- Help increase savings, lower debts, improve credit & decrease financial stress
- Telephonic consultations to save you time
- Peace of mind for your future & finances



## PERSONAL WEBSITE

- Private & confidential
- Take the Assessment, see where you stand financially & get a personalized action plan
- Track financial well-being score over time
- Upload & share documents
- Videos, forms, calculators & coach notes
- Sign up for identity monitoring, Wallet, events, your credit report & credit score



## WALLET

- See all of your accounts in one place
- Track spending & monitor cash flow
- Make informed decisions with 24/7 visibility
- View, sort & filter transaction history
- Safe & secure with top monitoring systems including McAfee & TRUSTe



## CREDIT SCORE & CREDIT REPORT

- TransUnion credit score (updated every 30 days) & credit report (updated annually)
- Won't hurt credit score & it's confidential – for your eyes only
- Help accessing Experian & Equifax reports
- 24/7 credit & identity monitoring
- Fraud alerts, via text and email, for suspicious activity



## FINANCIAL EDUCATION

- Formats include on-site classes, monthly webinars & workshops
- Topics covering virtually all areas of finance & related life events
- Presented by money coaches who specialize in subject matter
- Recordings, worksheets, handouts & copies of the presentation are available.



## REWARDS (CHANCES TO WIN EVERY MONTH!)

- Link an account in Wallet for a chance to win a \$50.00 gift card
- Attend any class or webinar for a chance to win a \$50.00 gift card
- Retake your financial wellness survey during your 3rd money coaching call for a chance to win a \$100.00 gift card

# CG SUPRT Financial Wellness

Here's the inside scoop on what we can do for you!

**What is the CG SUPRT Financial Wellness program?** This CG SUPRT program is your new financial wellness program provided by your employer. Now you have your own personal, confidential and unbiased Money Coach as one of your employer-funded benefits.

**What will the money coaching program do for me?** Simply put, this program is the most complete financial wellness program available anywhere. The whole purpose of the program is to help you overcome any financial challenge and accomplish any financial goal. With your trustworthy coach, you will build a strong and secure financial future, increase wealth and improve net worth.

**What is the difference between a financial advisor and a Money Coach?** While these two terms seem very similar, they are actually quite different. A traditional financial advisor's job is to manage your money for you, make suggestions, and ultimately get paid for doing it. The fees can be based on transactions, commissions or a number of other factors.

A Money Coach, on the other hand, assists and guides with the end goal of teaching you new habits. They are salaried employees, and unlike most financial professionals, they truly have nothing to sell. Their sole focus is helping people improve their financial lives through one-on-one confidential and unbiased coaching relationships.

**What subjects can I discuss with my Money Coach?** Subjects include but are not limited to debt, credit, spending, saving, student loans, identity theft, divorce, taxes, mortgages, short sales, bankruptcy, retirement, investing, benefits and insurance.

**Can my spouse/partner join me during consultations?** Of course – and we highly recommend it! Not in the same location? Not a problem. Your Coach can teleconference your spouse/partner into the call.

**How often do I meet with my Money Coach and how long are consultations?** Consultations with your Money Coach are typically thirty minutes in length. Time between consultations varies by individual. On average you will meet with your Money Coach every seven to fourteen days.

**What experience does a Money Coach have?** Our staff has an average of twenty-two years of relevant professional experience and multiple certifications from the financial services industry. Designations & accreditations:

Certified Credit Counselor	CITRMS® (Certified Identity Theft Risk Management Specialist®)
Certified Tax Coach™	CMPS® (Certified Mortgage Planning Specialist)
AFC® (Accredited Financial Counselor®)	CPA (Certified Public Accountant)
CCFS™ (Certified College Funding Specialist™)	CRTP (CTEC California Registered Tax Preparer)
CCRR® (Certified Credit Report Reviewer)	CSA (Certified Senior Advisor®)
CCRS™ (Certified Credit Repair Specialist™)	EA (Enrolled Agent)
CDFATM (Certified Divorce Financial Analyst®)	ELATM (Education Loan Analyst™)
CFEd® (Certified Financial Educator®)	Fair Credit Reporting Act (FCRA Certification)
CFP® PROFESSIONAL (CERTIFIED FINANCIAL PLANNER™ PROFESSIONAL)	FRS™ (Fraud Resolution Specialist™)

**When is my Money Coach available to talk?** Mon - Fri: 6:00 a.m. - 8:00 p.m. PT

**Is my information kept confidential?** Yes, we do not sell or share your information with third parties, and use of the program is kept confidential as well – even from your employer.

**Does CG SUPRT offer tax filing assistance?** CG SUPRT offers free online tax filing through H&R Block, which you can access through [cgsuprt.com](http://cgsuprt.com). If you have questions, please call 1-855-CG SUPRT (247-8778).

## TRANSFORMING YOUR FINANCIAL FUTURE STARTS TODAY

To learn more about your financial wellness program, visit [cgsuprt.com](http://cgsuprt.com), click the "Financial" tile, then select "Financial Coaching", or call 1-855-CG SUPRT (247-8778). It'll be awesome. Seriously.