



Selecting a Workplace Financial Wellness Program

Step 1: Conduct a needs assessment to determine your workforce’s financial needs.

Step 2: Use the following as a guide to match your workforce’s needs.

ACCESS



Financial Counseling

may be suitable for
Small- to mid-size employers for in-person services
All industries, especially health care, retail, hospitality



Financial Education

may be suitable for
Full-time, higher-wage workers
Employers pairing products with other financial services



Online Financial Tools

may be suitable for
All sizes, especially large workforces
Workers with Internet access

SOLUTIONS



Debt Management

may be suitable for
Workers with student loans, mortgages, or credit card debt
Small- to mid-size employers for in-person services



Loans & Wage Advances

may be suitable for
Lower-wage workers
Employers pairing products with other financial services



Savings Products

may be suitable for
Lower-wage workers or workers with specific savings goals
Employers pairing products with other services

Download *Workplace Financial Wellness Services: A Primer for Employers.*

This document is part of the Employee Financial Wellness Programs (EFWP) Project.



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