

## CONTACT

[www.mentorogroup.com](http://www.mentorogroup.com) | 844-324-2411



**FINANCIAL MENTORS  
FOCUSED ON  
MONETARY WELL-BEING.**

# ABOUT US

ENGAGE + EXAMINE + EDUCATE + EMPOWER

## { mentoro }

Mentoro seeks to spread financial literacy in the workplace by providing unbiased financial education via experienced money mentors. We create customized programs tailored to company need that ease financial stress and equip employees to plan for their future. We place an emphasis on supporting our partnerships by driving positive participant results.

## { the opportunity }

Offering financial wellness to your employees is an opportunity to help in correcting a major crisis. The working population is living in a state of financial stress. They're spending more, saving less and jeopardizing their financial health in the process. Our solution aids in reducing loans and distributions, increasing contributions, and enhancing plan design through financial education and examination.

Companies are implementing financial wellness for two reasons. The first is to solve a problem in one of the following categories: Financial Stress; Retirement (un)Preparedness; Fiduciary Liability. The second is to achieve long term goals like employee retention, competitive advantage, and healthy turnover.

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# METHODOLOGY

## { our methodology }

Our methodology focuses on program customization, reporting & measurement, participation, and implementation. We believe the key to success is creating lasting behavioral change by following a service model.

## { our vision }

We take a behavioral science approach to driving better results by enabling a deeper understand of why people make the choices they make and why they often fail to engage on key financial matters. Financial Wellness is not an event; it's an ongoing process that requires partnerships between members in our industry to help educate the general public.

HOW IT WORKS

**Collaborative  
Financial Wellness <sup>SM</sup>**  
Customized Unbiased  
Education



HUMAN



TECHNOLOGY



BEHAVIOR

HOW IT WORKS

**Monetary Momentum  
Service Model <sup>SM</sup>**  
Behavior Change  
& Maintenance



ENGAGEMENT



EXAMINATION



EMPOWERMENT

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# SERVICES

STANDARD PROGRAM SERVICES LISTED BELOW

## { mentoro implementation team }

- Financial Advisor & Education Team

WORKSHOPS, ONE-ON-ONE CONSULTATIONS PLAN

- Plan Management Team:

BENEFIT INTEGRATION, LOGISTICS COORDINATION, AUTOMATIC ENROLLMENT FOR ALL, ELIGIBLE EMPLOYEES

- Fiduciary Committee Representation

## { mentoro portal & technology }

- Participant Portal Access & Administration
- Mobile-Friendly & 24/7 Accessible
- Gamification
- All future technology enhancements
- Program Feature Access: EXAM & SCORE SUMMARY; RESOURCE CENTER; ACCOUNT AGGREGATION; FINANCIAL PLANNING SOFTWARE; CONTACT CENTER; BENEFIT SERVICES; INFORMATION; PARTICIPANT PROFILE

## { mentoro contact center }

- Toll Free Phone Number
- Licensed Representatives dedicated to your plan
- Customer Service E-Mail
- Digital Appointment Setting

## { mentoro marketing }

- Participant Communications
- Financial Fitness Class or Event Promotion
- Notification of Financial Advisor

## { mentoro reporting }

- Participant: Exam Summary & Dashboard
- Company: AGGREGATE REPORT & RECOMMENDED EDUCATION PLAN; ENROLLMENT & ENGAGEMENT REPORT; ACTION TAKEN REPORT; END OF THE YEAR PROGRESS REPORT

{ Participant Access to Mentoro Network Specialists  
Contact Us Today for a Customized Proposal! }

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