

# mentoro

## FINANCIAL EDUCATORS

## How It Works For Participants

### *identify your desired financial wellness journey*

Our goal for participants is simple. We seek to improve financial literacy and retirement preparedness through provided education, consultation, and resources. The **best** part about it—it's all handled between Mentoro and your employer, so that your financial fitness remains a priority. All you have to do is **participate**.

**Through Collaborative Financial Wellness, we empower participants and aim to create a happier and more productive workplace.**

### *Participant Needs*

- Engaging 24/7 in a mobile friendly financial hub
- Examining financial status and track progress
- Completing Next Steps and Action Items
- Empowering through self-guided education
- Aggregate all accounts for full financial view
- 1:1 Educational Assistance
- Educational Classes on high risk topics
- Access to a network of qualified professionals
- Have fun while working towards your goals



### *Mentoro Solution*

- Mentoro Participant Portal
- Mentoro Financial Wellness Survey
- Mentoro Action Item To-Do List
- Mentoro Resource Center
- Live Account Aggregator and budget tracker
- Mentoro Contact Center
- Mentoro Financial Fitness Classes
- Mentoro's vast and vetted referral network
- Win incentives or earn activity points

**To learn more about receiving this benefit at your workplace?  
Visit [www.mentorogroup.com](http://www.mentorogroup.com)**

