



# Money Coaching

Guidance from Trusted Mentors and Professional Financial Experts



## Your story is unique... and so is your financial journey.

Through Concern, you have access to credentialed specialists – experts with more than 20 years of experience in personal finance.

We'll connect you with an unbiased money coach who listens first, then helps you explore any financial topic. Together, you'll create a plan that reflects your values, priorities, and goals – designed to work with your life.



**Money used to overwhelm me. My Money Coach helps me stay positive and shows how small wins grow into big ones. With his support, I feel confident and motivated to keep moving forward with my finances."**



**Feeling stressed about money? You don't have to figure it out alone. Call our toll free number and ask to be connected to a Money Coach.**

Call **800.344.4222** or visit **[employees.concernhealth.com](https://employees.concernhealth.com)**

### Talk to a Coach for Any Stage of Life

**YOUR BENEFIT:** You are eligible for two free 30-minute consultations per issue per year with a financial specialist.

**Money Management:** Budgeting, debt reduction and counseling, saving for financial emergencies (*paycheck stress, debt, emergencies*)

**Tax Basics:** Common income tax questions, deductions vs. credits, tax return preparation (*filing confusion, refunds, credits*)

**Consumer Credit Services:** Credit after bankruptcy, credit repair scams, correcting inaccurate information on credit report disputes

**College Planning:** Saving for college, college funding (*529s, student loans*)

**Investment Basics:** Types of investments, 401(k) – employer match, bonds (*savings vs. investing, education*)

**Retirement Planning:** IRA rollovers, Medicaid, Medicare, social security benefits, reverse mortgages (*"Am I on the right track?"*)

