



# Financial wellness assessment report

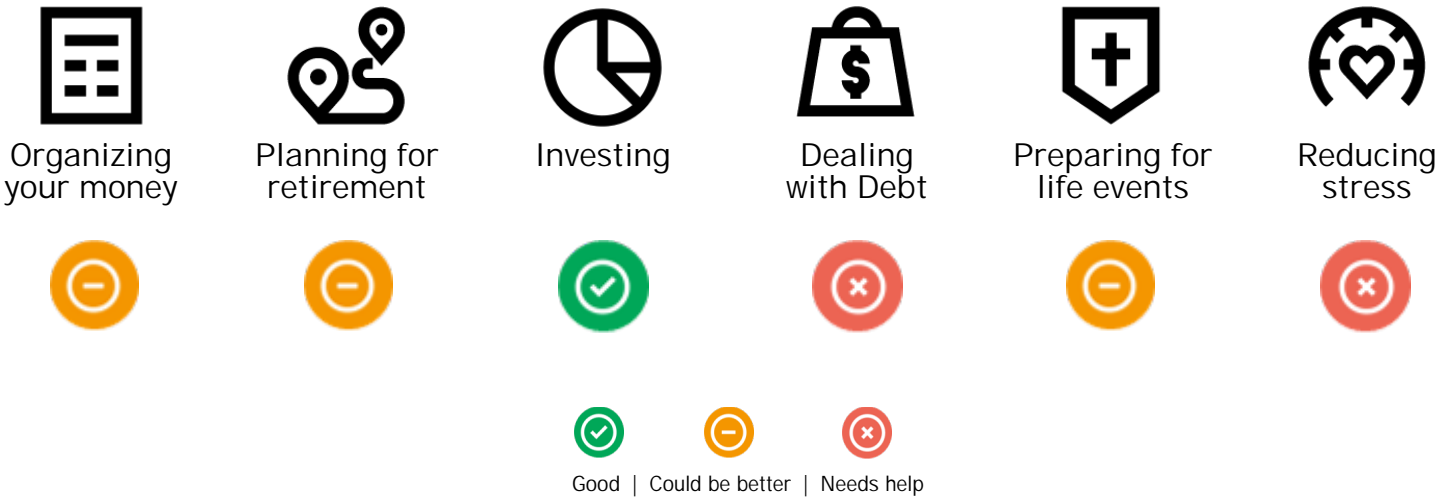
ABC Company Sample 401(k) Plan

From 01/01/22 to 04/30/23

Unique users: 145

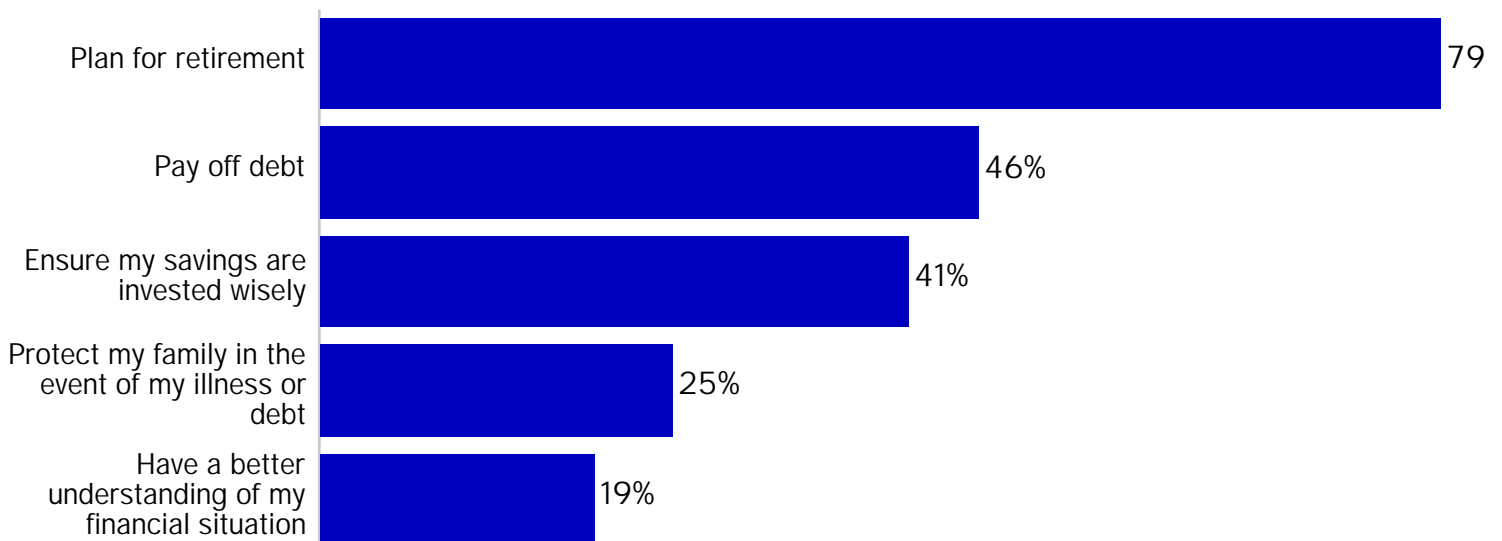
## Summary

The financial wellness assessment covers six specific aspects of a plan participant's financial well-being. Based on the cumulative results for your participants, here are their areas of strength, as well as those in need of attention.



## Top financial priorities

Here are the top financial priorities identified by your participants as part of the financial wellness assessment.



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## Organizing your money

Keep track of income and expenses

Yes	No
73%	27%

Usually spend within means

Yes	No
92%	8%

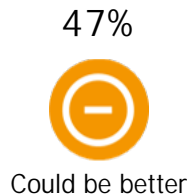
Have an emergency fund

Yes	No
92%	8%



## Planning for retirement

How are you doing with savings?



Know how much is needed to fund retirement

Yes	No
29%	71%

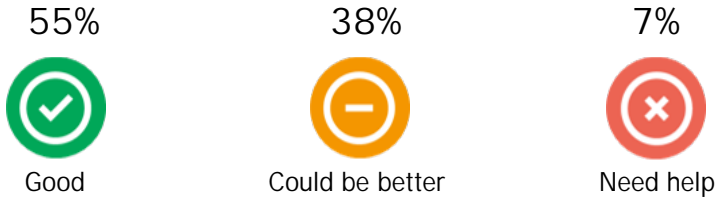
Would like help with financial planning

Yes	No
75%	25%



## Investing

Are your savings invested in a way that is right for you?



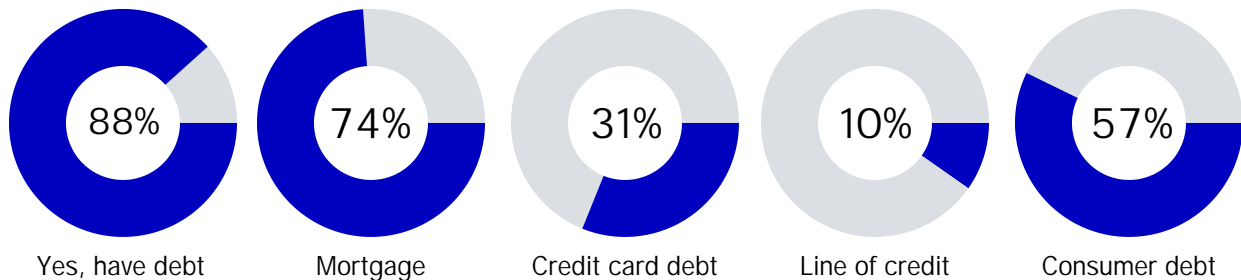
Could use help choosing their investments

Yes	No
74%	26%



## Dealing with debt

How are you doing with managing your debt?



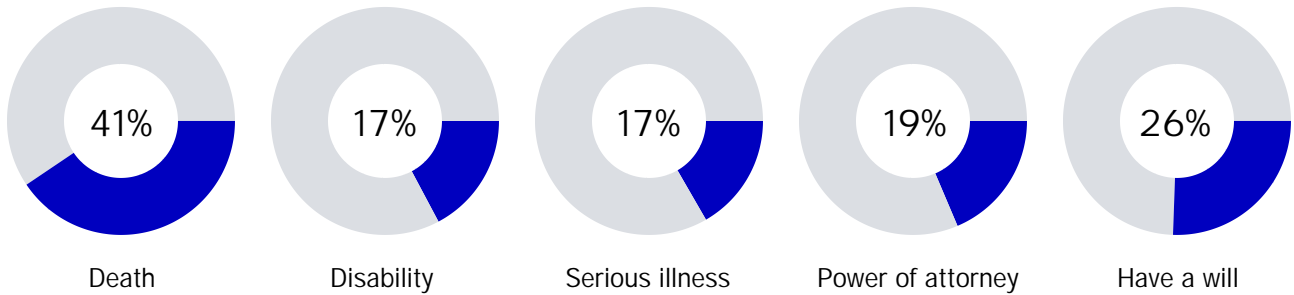
Make payments on time every month

Yes	No
98%	2%



## Preparing for life events

Would feel financially prepared if one of these events happened to self, spouse, or dependents.



## Reducing stress



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