Executive Financial Counseling

Simplifying financial management. Increasing engagement.

Every day your executives strive to make your organization more efficient while working to simplify and enhance your customers' experience. It comes as no surprise that executives desire this same simplicity and efficiency when it comes to managing their employer-sponsored benefits and financial well-being. And according to recent surveys, they want your help to achieve it:

Top Desired Benefit

Financial wellness program with access to unbiased counselors[1]

85%

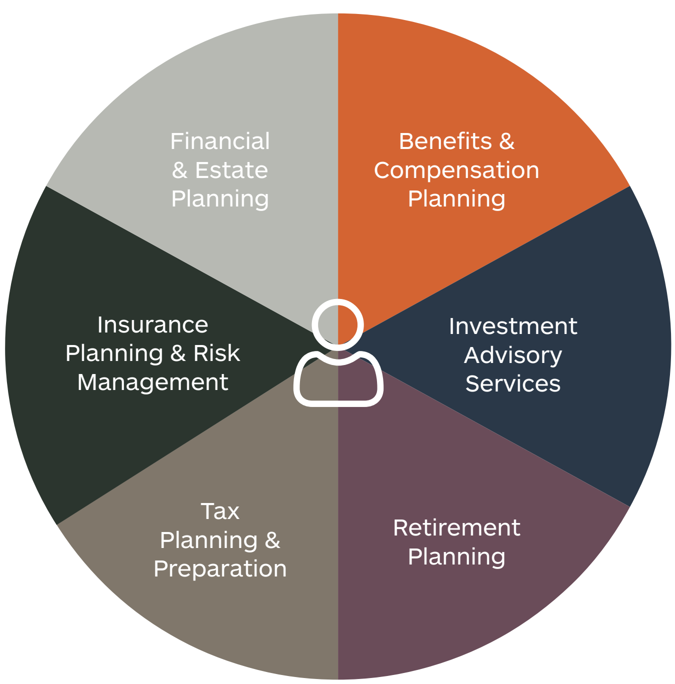
Of adults trust their employer to provide access to sound, independent financial advice[2]

A comprehensive, integrated financial solution

Let Cerity Partners empower your leadership team. Our Executive Financial Counseling benefit combines holistic financial planning with a single point of contact, always available to provide guidance, answers and peace of mind. To us, "simplifying" means giving your executives time back to do what they enjoy, and with no products to sell, our commitment is to their financial well-being—nothing else.

One-on-one support. Objective advice. On their terms.

A dedicated Cerity Partners financial counselor works with each executive to create and execute a personalized plan that addresses all aspects of their financial life. Consider Cerity Partners as an outsourced family office, eliminating the time and hassle involved with coordinating across multiple advisors. More importantly, your executives determine the level of support they receive; with no obligation to invest their capital with us.



CERITY PARTNERS

Streamlined account management. Faster access to information.

Most executives spend time and energy gathering financial information from multiple sources just to view a comprehensive snapshot of their financial landscape. Charles Schwab, our preferred provider of trust, custody and stock plan administration services, enables your team to view and manage their equity-compensation plans, personal investment portfolios and retirement accounts from one central location. Having this aggregated account information at their fingertips makes it easier for executives to:

Monitor investments

Track progress toward goals

Take action

Experience a *better* approach to financial service.

All the experts. One point of contact. Comprehensive financial advice, tailored to you.

Visit ceritypartners.com to learn more.

[1] PWC 2018 Financial Wellness Survey, May 2018

[2] Mercer, "Healthy, Wealthy and Work-Wise; The New Imperatives for Financial Security," U.S. Key Findings, 2018