

# Optum



## Get your finances into shape with the help of a Financial Coach



One of the most common sources of stress for Americans is money.\* So whether you're looking to lower your debt, boost your savings or dip a toe into the investing pool, we can help.

### Introducing Financial Wellbeing

Powered by BrightPlan

Through your Emotional Wellbeing Solutions financial benefit, you now have access to tools, tips and a BrightPlan Financial Coach to help you create, manage and reach your financial goals. And no need to worry – all your information will be kept secure and confidential.

24/7  
availability

Confidential

No cost  
to you

BrightPlan®

## Support for everyday life

Lighten the financial weight off  
your shoulders



Scan the code or visit  
**liveandworkwell.com.**

Sign in with your  
company access code: SIA .

From the home page, search  
financial wellbeing to learn more.

## Meet your BrightPlan Financial Coaches

BrightPlan Financial Coaches are Certified Financial Planners, Financial Therapists, Financial Counselors, Tax Experts, Investment Advisors and more are certified in empathy and financial coaching.

Our coaches will never sell you anything – their job is to teach you how to create better money habits.

### What tools are available?

With BrightPlan, you'll find a robust library of content, self-paced workshops, articles, courses, financial assessments, calculators and worksheets. Schedule a call online, or chat with a Digital Finance Coach.



There's no cost to schedule an online appointment. Your use of this service will be kept confidential in accordance with your health plan's privacy policy.

**Schedule online at  
[liveandworkwell.com](https://liveandworkwell.com).  
Sign in with your company  
access code:  
**SIA.****

\* PwC's 10th annual Employee Financial Wellness Survey (PwC US; 2021).

**Information provided by this service is for informational purposes only. All information and ideas should be discussed in detail with your individual advisor prior to implementation to determine if it is applicable to you.**

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