

TBX Case Study: Wellness Plan Strategy & Due Diligence

Client	Large multi-state energy services company
Number of Employees	6,000 domestic employees
Background	After many years of concentrated focus on developing a robust health and wellness platform, the client recognized the importance of incorporating a financial wellness component into their overall wellness strategy.
Engagement	<p>Following an initial Discovery Meeting during which client goals and employee needs were established, TBX performed a comprehensive market review of the Financial Wellness resources in the market.</p> <p>Service functionality evaluated included:</p> <ul style="list-style-type: none">• Workshops related to personal financial planning, budgeting, cash flow management, saving for retirement, etc.;• On-site meeting capabilities (both group and one-on-one); and,• Online resources to facilitate employee education and engagement. <p>TBX remains available to provide client support following the due diligence process to assist ongoing service needs relating to plan implementation and maintenance.</p>

TBX Assists with Financial Wellness Plan Due Diligence

Six Concourse Parkway, Suite 2750
Atlanta, Georgia 30328
www.tbxpartners.com
678-904-9326

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