HEALTHCARE LIVE EVENT ADVERTISEMENT

Case Study

INITIATIVE

+ Create a complementary piece to use during a Southern California Permanente Medical Group (SCPMG) employee event, offering a free financial consultation.
+ Build a physical brochure to hand to an SCPMG employee following a free consultation that was offered during a special promotional period.

CHALLENGES

+ Working with a group of financial advisors to understand what they would discuss in this free consultation so I could accurately advertise the offer.
+ How to explain the connection between Edelman Financial Engines and SCPMG's record keeper without promoting a direct competitor.

SOLUTION

+ Create a quick, scannable flier handed out during the event that highlights the benefits of our free financial consultation, encouraging employees to sign up.
+ Use a small paragraph to differentiate our services from those of their record-keeper – clearing up any confusion surrounding this relationship, and showcasing the benefits we could provide that their record-keeper could not.

EXECUTION

+ Crisp copy describing our services in a conversational tone.
+ Encouraging employees to pause and reflect on their financial situation – do they need more help to take their wealth further?
+ Touching on how we can help with major (often complex) financial planning components such as taxes, estate planning, insurance, retirement, and investments.

About Edelman Financial Engines

We've been helping SCPMG physicians plan for their futures for over 15 years. We model 38,000 investments every month and offer more than 10 million workers[2] access to our investment management and retirement planning services. As a fiduciary, we always put your interests first. Not simply because it's a legal requirement, but because it's the right thing to do. Our mission is to move everyone's financial lives forward. Including yours.

How are we different from Charles Schwab?

We are here to give you support, guidance and advice. Charles Schwab provides your day-to-day 401(k) account servicing needs (for example, beneficiary changes, loan and withdrawal requests). You should continue to contact Charles Schwab, the plan's administrative service provider, for any of your account servicing needs.

Learn more:

[redacted]

BARRON'S

#1

INDEPENDENT FINANCIAL ADVISORY FIRM IN THE NATION

Sept. 2018-Sept. 2022

AWARDED EACH SEPTEMBER BASED ON DATA WITHIN A 12-MONTH PERIOD. COMPENSATION PAID FOR USE AND DISTRIBUTION OF RATING.

[1] The *Barron's* 2022 Top 100 RIA Firms list, a seven-year ranking of independent advisory firms, is qualitative and quantitative, including assets managed by the firms, technology spending, staff diversity, succession planning and other metrics. Firms elect to participate but do not pay to be included in the ranking. Compensation is paid for use and distribution of the rating. Investor experience and returns are not considered. The 2018 ranking refers to Edelman Financial Services, LLC, which combined its advisory business in its entirety with Financial Engines Advisors L.L.C. (FEA) in November 2018. For the same survey, FEA received a precombination ranking of 12th.

[2] Edelman Financial Data Warehouse, as of March 31, 2022.

* The industry average is based on reporting in PriceMetrix's, "The State of North American Retail Wealth Management, 10th Annual Report" which found that based on PriceMetrix's proprietary database (as of the end of 2020 was comprised of detailed client-holdings and transaction information from roughly 70,000 financial advisors), the average fee in 2020 for accounts with assets between $1M and $1.5M was 1.05%. For the same asset range, the 2019 average fee was 1.05% and the 2018 average fee was 1.06%. Industry average fees are subject to change. Investment Advisor services vary, and some advisors in the studies may provide different services than Financial Engines Advisors L.L.C.

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YOUR RETIREMENT PLAN HAS A VALUABLE FEATURE: ADVICE

Investment advice and Professional Management from Edelman Financial Engines for your SCPMG 401(k) Savings & Investment Plan.

PERMANENTE MEDICINE.
Southern California
Permanente Medical Group

Edelman Financial Engines®

SCPMG CHOSE US TO HELP YOU PLAN

Whether you want expert guidance to help manage your investments on your own, or more hands-on financial support from a professional, we'll help you meet today's needs while preparing for tomorrow.

Experience the value of working with an advisor, for a lower cost than you might pay outside of your plan benefits.

Let's get started

Get dedicated guidance for all your financial goals beyond just your 401(k) account, such as:

+ Retirement income planning
+ Social Security optimization
+ Medicare solutions
+ Charitable giving
+ Long-term care

Choose the right type of advice for you

From your first year of residency to a per diem position, we have the expertise to fit your needs.

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  Get a dedicated advisor to help you reach all your financial goals beyond just retirement.
+ **Don't have time to monitor your investments anymore?**
  Let us manage your 401(k) account for you. We'll optimize your portfolio, and you'll gain confidence knowing your investments are being monitored by professionals.
+ **Want to be in control?**
  Access professional-grade retirement planning tools to help you efficiently manage your retirement account.

Visit [redacted]
or call us at **(XXX) XXX-XXXX**, business days from 6 a.m. to 6 p.m. PT.

Put it all together

To help you build wealth more effectively, every facet of your financial life - taxes, estate planning, insurance, retirement and investments - must be wired together.

We'll help you connect those pieces and identify opportunities for improvement that could take your wealth to the next level.

Our advice is tailor-made for your personal goals, and our investment management approach is based on Nobel prize-winning heritage and tax efficiency.

Check your progress. Plan your future.

Keep an eye out for your **2023 Retirement Evaluation** later this year. You'll see where you stand and learn ways to help improve your savings and investment outlook.

EVERYONE DESERVES TO ELEVATE THEIR FINANCIAL POTENTIAL

And it all starts with a **complimentary financial plan**. Partner with a dedicated advisor to get:

+ Strategies to help you reach your personal goals
+ A guide toward your optimal retirement
+ Personal investment recommendations
+ A comprehensive cash flow summary
+ A look at how Social Security affects your ability to retire

CONTINUE THE CONVERSATION

Scan this code to make an appointment with an advisor

83%

of Americans stress less about finances when working with a financial professional.[1]

Edelman Financial Engines®

[1] Greenwald Research. (2022). *Everyday Wealth in America. 2022 Research Findings: The Intersection of Life and Money.* Edelman Financial Engines. Retrieved March 16, 2022, from https://www.edelmanfinancialengines.com/wealth-in-america-2022/

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