Banner Health

Banner Health Financial Wellness

Creating a Path To Make Your Financial Life Easier

My Primary Financial Priorities Are...

My immediate finances and monthly expenses

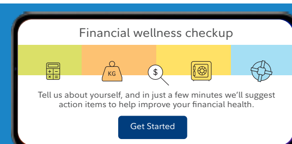
Establishing a financial footing before focusing on retirement

Balancing multiple goals with finite resources

Maximizing savings while minimizing taxes and making good retirement decisions

MY WEALTH

Get my personal financial wellness checkup
(Available to all Team Members; NetBenefits® login required)



MY WELL-BEING

Investing involves risk, including the risk of loss.

886601.6.0

CREDIT COUNSELING AND DEBT MANAGEMENT—As part of your benefits, you have access to credit counseling services (at no cost) and debt management plans (fees apply) through Money Management International (MMI) to help get a fresh start and financial peace of mind.

VIEW *MANAGING MY MONEY* WORKSHOP—Learn about creating a budget, emergency savings, debt management, and retirement basics.

VIEW *MANAGE UNEXPECTED EVENTS & EXPENSES* WORKSHOP—This workshop will help you learn how to take control of your budget and understand your financial options after an unforeseen event.

WHY AN EMERGENCY FUND SHOULD BE A TOP FINANCIAL PRIORITY

HOW TO GET OUT OF DEBT—Digging out of debt can be painful—but the payoff is empowering. We'll help you get started.

TAKE HOME PAY CALCULATOR—See how your pre-tax contribution might affect your take-home pay.

My immediate finances and monthly expenses

BACK TO HOME

CREDIT COUNSELING AND DEBT MANAGEMENT—As part of your benefits, you have access to credit counseling services (at no cost) and debt management plans (fees apply) through Money Management International (MMI) to help get a fresh start and financial peace of mind.

VIEW *IDENTIFY & PRIORITIZE YOUR SAVINGS GOALS* WORKSHOP—This workshop will help you start to think about the savings goals that are important to you and understand how you can achieve them.

SAVING FOR ANY GOAL

THINGS TO CONSIDER BEFORE TAKING A LOAN FROM YOUR RETIREMENT PLAN

VIEW *TAKE THE FIRST STEP TO INVESTING* WORKSHOP—This workshop will help you understand key investing concepts, common investment types, how to select a mix of different investments that aligns with your goals, the benefits of investing in your workplace savings plan, and how to choose your investment approach.

HOW TO START INVESTING—This article can help you learn about risks, priorities, and common investment strategies.

Establishing a financial footing before focusing on retirement

BACK TO HOME

CREDIT COUNSELING AND DEBT MANAGEMENT—As part of your benefits, you have access to credit counseling services (at no cost) and debt management plans (fees apply) through Money Management International (MMI) to help get a fresh start and financial peace of mind.

VIEW *GET STARTED & SAVE FOR THE FUTURE YOU* WORKSHOP—This workshop will help you understand the benefits of saving in your workplace savings plan, how to enroll in your plan, and small steps you can take today to save more for the future.

BUYING OR SELLING A HOUSE

EXPLORE OPTIONS FOR YOUR STUDENT LOANS—This Student Debt Tool can help you understand all of your loans and find ways to lower your monthly payment or pay off your debt faster (or both!)

POWER OF SMALL AMOUNTS—See how a change as small as a 1% increase in your contribution to your workplace savings plan can make a big difference for the future.

THE FIDELITY RETIREMENT SCORE—Get a snapshot of your retirement just by answering six quick questions.


Balancing multiple goals with finite resources

BACK TO HOME

- VIEW *TURN YOUR SAVINGS INTO RETIREMENT INCOME* WORKSHOP
- FIVE WAYS TO HELP PROTECT RETIREMENT INCOME
- MAKE CHARITABLE GIVING A WIN-WIN PART OF YOUR WEALTH PLAN
- HOW TO INVEST TAX-EFFICIENTLY
- SIX KEY MEDICARE QUESTIONS
- ESTATE PLANNING ACTION CENTER

Maximizing savings while minimizing taxes and making good retirement decisions

BACK TO HOME