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intellicents rolls out robo financial plan

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ALBERT LEA, Minnesota – As an integral part of its worksite financial wellness initiative, intellicents is rolling out its “life steps” ROBO financial plan.

“We believe that financial wellness plans must go beyond education and coaching to truly ‘move the dial’ in the financial health of the American worker,” commented Brad Arends, Co-Founder and CEO of intellicents. “They need and want advice, but before our advisors and CERTIFIED FINANCIAL PLANNERS™ can do that, we needed to figure out how to deliver a foundational financial plan to every employee.”

According to a 2018 survey by American Century Investments, 73% of employees age 25 to 54 find it somewhat or very attractive if their employer offered holistic financial planning and advice as an employee benefit; and 66% of workers age 55 to 65 find it somewhat or very attractive.

“With just an employee census containing age and wage, we can provide a foundational financial plan for an employer’s entire workforce,” said Matt Twedt, President of Personal Financial Management at intellicents. “From there, employees can further engage with our advisors and CERTIFIED FINANCIAL PLANNERS™ provide additional details of their life dreams and financial information, and receive a holistic financial plan and ongoing advice on how to make it a reality. At intellicents we call it dream based investing!” Twedt went on explain that life steps provides

each employee rules-of-thumb on necessary emergency funds to protect against the unforeseen events, recommended life and disability insurance protection amounts, debt load/credit management, and retirement readiness. And the more information the employer can provide about the employee’s family situation and current employee benefits, the more detailed the annual report can be.

“This is the key to employee engagement in your worksite financial wellness program,” added Arends.

intellicents is reimagining financial services for employers and individuals. Through retirement plan design and fiduciary investment consulting, personal financial management, group insurance, and worksite financial wellness services they are paving a smarter way for the American worker and their employer. With headquarters in Albert Lea, Minnesota, and locations in Eden Prairie, Minnesota, Pella and Lake Mills, Iowa, Overland Park, Kansas, Tacoma, Washington, Denver, Colorado, and now Dallas, Texas, they serve over 350 employers, with 50,000 participants, and almost \$4 billion in assets under management and advisement. More information about intellicents can be found at www.intellicents.com.

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