

At a Glance | December 8, 2022

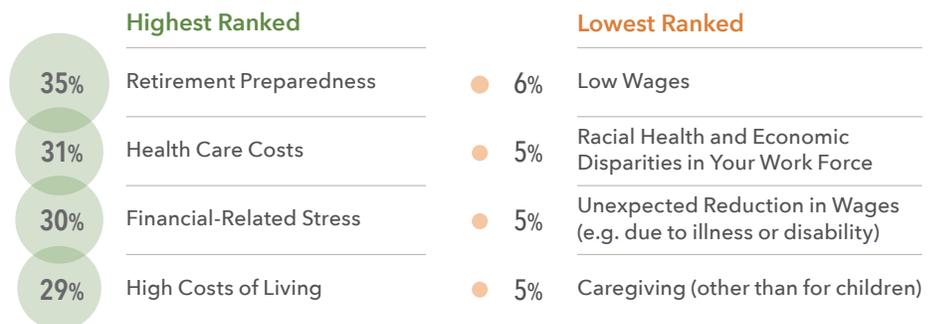
The Current State of Financial Wellbeing Programs

The 2022 EBRI Financial Wellbeing Employer Survey reveals that employers continue to expand their financial wellness programs. Rankings of current goals, success measures, and challenges are reviewed.

FOCUS AREAS

Financial wellness programs are expanding their focus beyond retirement preparedness to include a more complete picture across all aspects of an individual's finances.

What are the top issues faced by your employees that your financial wellness initiatives are designed to address?



MEASURING SUCCESS

With the hope of reducing employees' financial stress and increasing productivity, companies are looking for better ways to evaluate the impact of their financial wellbeing programs, whether on a retention/recruitment or productivity basis.

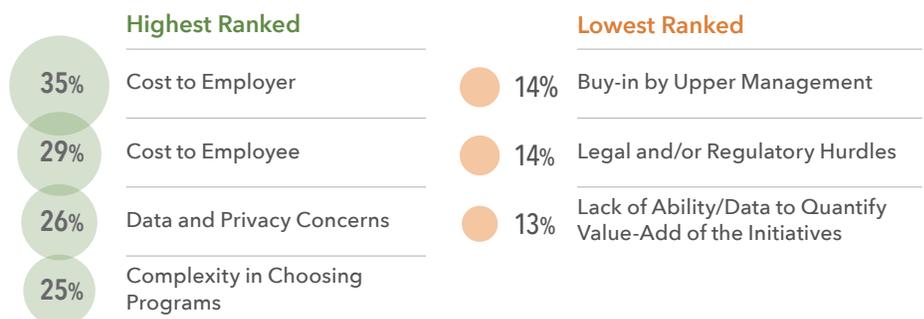
What are the top factors that are or will be important in the measurement of your financial wellness initiatives?



CHALLENGES

Top challenges to offering these programs were costs to both the employer and the employee. Data and privacy concerns and complexity surrounding the programs rounded out the top four.

What are the top challenges your company faces or anticipates facing in offering financial wellness benefits in the workplace?



SOURCE: Copeland, Craig, "2022 EBRI Financial Wellbeing Employer Survey: Employee Satisfaction and Retention a Primary Focus," *EBRI Issue Brief*, no. 573 (October 27, 2022).

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