



A FINANCIAL WELLNESS PROPOSAL

An educational program designed to engage & encourage employees to become more financially literate and increase their overall financial well-being.

PRESENTED BY
ARIES FOUNDATION FOR FINANCIAL EDUCATION, INC

WHO WE ARE

ARIES FOUNDATION FOR FINANCIAL EDUCATION, INC.

ARIES Foundation for Financial Education, Inc. is a nonprofit dedicated to the mission of

"Trying to help everyone have a better relationship with their money..."

HOW IT WORKS: The ARIES Foundation has more than 150+ titles on Financial Well-Being ranging from the basic, 'Saving vs Spending', to the more complex, 'Do I Need A Will', to fun 'Saving For A Dream Vacation'.

The employer chooses which of the titles they would like to present for their employees, usually based on the workplace demographics.



Current Offerings

Saving vs Spending

Average Investor

Who's FICA?

Rainy Day Fund

Importance of Credit

Creating Wealth

An Emergency Reserves Fund

Tackling Debt

Have Fun Buying A Car

Buy or Lease?

Are Annuities Bad?

Save on College

All About Bitcoin

Social Security Claiming

Making A Major Purchase

Planning Dream Vacation

Secret Cost of Pets

Do I Need A Will?

SMART Goals

Top 5 Questions on Long Term Care

Negotiate Your Worth

Ballin' On A Budget

Retirement Game

Six Blunders of Retirement Plan

Handling Student Loans

Warning Signs of Diminished Capacity

Sell In May & Go Away

Finding Balance

Know Your Benefits

Ins & Outs of Disability Coverage

Top 5 Questions on Life Insurance

FSA & Elective Plans

Investing & Investments 101

Current Offerings

Recession is Coming
Dealing With Financial Stress
What is Financial Wellness
Health & Wealth in Retirement
Creating Wealth
Take Control of Your Financial Future
Repeating Financial Missteps
Stop Wasting Money
Where In World Should I Retire
Panini Generation
Talk to Kids About Money
Nontaxable Retirement Streams

FACT - Financial Answers in Career Transition
Beneficiaries Are Important
What if you retired this year
Worried about your 401k
5 Tips to survive the holidays
Gift to Charity & get Paid
ABCs of Medicare
What to do with a Tax Refund
Summer Spending
IRA vs ROTH IRA
529 Accounts/Saving for College
Is Employer Plan best way to Save for Retirement

LET'S DO WELL CONCEPT

The workshops can be presented as a one-off or in a series on a day/time that fits for your Community. The presentations are recorded and shared back, so they can be distributed to all of the associates (examples below).



Monthly virtual webinar series to help you and your family be better with your money & finances

Fri. Aug 12 at 12:00 PM
Rainy Day Fund*

Wed. Set 14 at 12:00 PM
Tackling Debt*



[Sign Up Here](#)

[Sign Up Here](#)



*These webinars will be recorded and made available for all employees to watch in the future as well.

These workshops are offered at no cost, no obligation to your employees. The presentations are educational-only, promote no services or products, and are intended to enhance the financial literacy and well-being of employees.

For more information about our workshops, please contact Tom Alessi (617) - 682 - 7374 or email talessi@ariesfoundation.org



ORGANIZATIONS THAT WE WORK WITH:



Special Needs Resource Network
Helping those who care differently-abled



REFERRALS & RESOURCES



"THE EXPERIENCE HAS BEEN SUPERB. THE KIND OF INFORMATION THAT YOU BRING... YOU ALL; TOM & CRAIG PROVIDED FABULOUS ADVICE ON BUDGETING, CORRECTING COMMONS FINANCIAL MISSTEPS..."

Office of State Treasurer and Receiver General
Deborah B. Goldberg

MA State Treasurer Deb Goldberg on having ARIES Foundation as part of the Money Talk Tuesdays programming:

https://youtu.be/V3c4XhaVcso?si=ge7Jasm_sHoHmqR3



DEANA CRIESS
ASSOCIATE DIRECTOR OF
RECRUITMENT & ADMISSIONS
CAREER LAUNCH



"It is an incredible presentation, I have to say, the students have an incredibly good time. They're laughing the whole time and they're learning a lot. I highly recommend bringing these two in..."

Deana Criess – Perkins School for the Blind. You can listen to the short video (less than 2 minutes of Deana's impromptu recommendation during our webinar on Diversity & Inclusion by clicking here:

<https://youtu.be/Uk7DFF3qjgq>



PAUL BERGMAN
President of the Board of
Directors Amego, Inc



Once again I just want to thank Tom and Craig, guys, what you do, not just for us and Amego, and everybody else, it's just fantastic. You guys are terrific. I've had the pleasure of seeing you both in person, I've had the pleasure of purchasing one of those Patriots shirts, and I look forward to getting back to normal and being able to see you guys again...

Paul Bergman – Amego, Inc. You can listen to Paul's portion during the webinar on Charity Gifting Strategies here

<https://youtu.be/0aLi9QVtIqQ>

Elizabeth Chaves
Chief Financial & Administrator Officer
Rosie's Place, Boston MA

Erika Travinski
Chief Operating Officer
Center for Hope Foundation, Southbridge MA

For more information about our workshops, please contact Tom Alessi (617) - 682 - 7374 or email talessi@ariesfoundation.org