



# Kim Eldred, CPA

## Financial Accountability Coach

When money feels chaotic or confusing, I bring clarity and a plan.

## ARE YOUR EMPLOYEES FEELING THE DAILY PRESSURE OF MANAGING MONEY?

**Studies show that money has a direct effect on employees:**

- Over 55% of employees say that they worry about money on a daily basis, which increases stress in their lives
- Nearly 45% of employees say that they have been distracted at work due to financial issues.
- Over 50% of employees say that their financial problems cause daily stress in work.
- Close to 80% of employees agree that financial wellness is a vital component to a well built employee benefit package.
- Although many employees are satisfied with their benefits package, those who have a financial wellness part in their benefit package say it has a significant impact on their personal finances.
- Many employees feel strongly about retirement planning, however, nearly 60% say that they feel behind in planning for their retirement.

(Source: The 2022 Smart Dollar Employee Benefits Study)

## CALL OR EMAIL TODAY AND MAKE A CONNECTION:

As a Financial Accountability Coach, I can guide your employees to take control of finances and discover a life of financial freedom! Contact me today to add this excellent benefit to your employees' benefit package.

## YOUR EMPLOYEES CAN BENEFIT FROM FINANCIAL COACHING IN MANY WAYS

**They can learn more about:**

- ♦ Emergency savings
- ♦ Paying off debt
- ♦ Budgeting
- ♦ Retirement

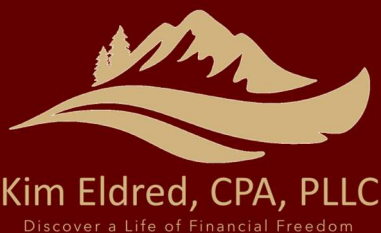
**They will:**

- ♦ Change their behaviors with money
- ♦ Have less stress
- ♦ Pay off debt
- ♦ Be prepared for emergencies
- ♦ Budget and plan to be more prepared
- ♦ Have a complete money plan

## YOUR BUSINESS CAN BENEFIT FROM FINANCIAL COACHING IN MANY WAYS

**Your business will experience:**

- ♦ Higher employee productivity levels
- ♦ Increased employee engagement
- ♦ High employee morale
- ♦ Lower employee turnover
- ♦ Less employee absenteeism



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## INVEST IN YOUR EMPLOYEES

### Introduce an Employee Wellness Program to include one or more of the following:

#### Groundwork Group

Twelve Interactive 45-minute group sessions  
Led by a Financial Accountability Coach  
facilitating a video course.

Virtual sessions so your employees can join from  
anywhere!

#### Employees will:

- **Understand Money:** Learn how money works and why it matters.
- **Decipher Jargon:** Get clear definitions of financial terms.
- **Follow Steps:** Receive easy-to-follow financial guidance.
- **Simplify Math:** Make math simple for budgeting and planning.
- **Personalized Advice:** Get tailored solutions for their finances.
- **Change Mindset:** Tackle their money mindset for financial well-being.

**Confidentiality will be  
maintained in all sessions.**

#### Groundwork DIY

Thirty Lessons – Two paces to choose from (daily or weekly)

Done on your own with access to a Financial Accountability Coach as needed.

#### Employees will:

- **Discover the Foundations:** Learn the basics of personal finance simply, clearly, and without making them feel behind
- **Understand Money Influences:** Recognize the habits, beliefs, and outside influences that have been shaping their financial decisions so they can work with them instead of against them.
- **Use Flexible Tools:** Gain practical tools that can adapt to their values, personality, and real-life situation.
- **Receive Personal Support:** Be invited to a private session with a Financial Accountability Coach after completing all 30 lessons.

#### One on One Coaching

Three Months of Individual coaching sessions with a Financial Accountability Coach.

Led by a Financial Accountability Coach meeting one on one with employees and spouse, (if applicable)  
Virtual Meetings so your employee and spouse (if applicable) can join from anywhere!

#### Employees will:

- **Personalized Coaching:** Receive over 7 hours of one-on-one financial coaching.
- **Focused Guidance:** Distraction-free coaching.
- **Balance Skills:** Learn to balance time and money
- **Financial Success Plan:** Develop a winning financial strategy.
- **Continued Support:** Option to purchase ongoing coaching after three months.