

Dream Broker Initiative

CORPORATE WELLNESS PROGRAMMING THAT MOVES EMPLOYEES FROM SURVIVING TO THRIVING



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WHAT WE DO

Jade Business Solutions helps companies build a workforce that stays. Through the Dream Broker Initiative, we deliver employer-sponsored wellness programming that addresses the root cause of disengagement most companies overlook: employee financial stress and the absence of personal goals. We partner with HR leaders and executive teams to bring practical, stigma-free financial and life planning education to employees at every level, through formats that scale from company-wide workshops to individualized coaching.

When employees have a plan for their money and a vision for their future, they show up differently. They stay longer.

CODES

UEI: DBZ7QAGM8UZ7

CAGE Code: 8Q575

NAICS: 541611

CERTIFICATIONS

Women's Business Enterprise (WBE) Certified

Woman-Owned Small Business (WOSB) Certified

CORE COMPETENCIES

Financial Wellness Programming

- Large-group workshops on financial fundamentals (in-person or virtual)
- Round table discussions for tailored problem-solving
- One-on-one employee financial coaching
- Peer accountability group facilitation

Goal Setting and Life Planning

- Personal dream and goal identification
- Financial planning aligned to individual life goals
- Mindset and behavioral coaching around money and motivation

Employee Benefits Optimization

- Identifying underutilized pre-tax benefits
- 401k contribution strategy and maximization
- Benefits education and navigation support

Financial Education Topics

- Budgeting and cash flow fundamentals
- Debt reduction strategies
- Psychology of money and financial confidence
- Tax planning basics

DIFFERENTIATORS

Dara Hartzler brings 20+ years of financial leadership experience as a Fractional CFO, paired with a coaching methodology that meets employees where they actually are. Unlike traditional EAP providers or generic wellness vendors, the Dream Broker Initiative delivers live, relationship-based programming with real follow-through. Participants leave with a written budget, a debt reduction plan, a personal goal, and a clear next step.

Jade Business Solutions also coordinates access to 401k strategists, CPA tax advisors, and benefits specialists, extending the value of each engagement at no additional cost to the employee.

PAST PERFORMANCE

Delivered a full-day financial wellness and goal-setting workshop for a national manufacturing company with employees spanning multiple states. Programming included group education, individual goal-setting exercises, and a structured follow-up coaching plan.