



T.Rowe Price

Financial Wellness | Our Approach

Clarity and Purpose

We know that participants have many financial priorities. And those priorities may shift and change over time.

Our goal is to help your participants improve their retirement outcomes by making it easier to manage short-term financial demands that could disrupt their long-term retirement goals.

Formed by Data

88%

say that saving for an emergency was a major or minor financial goal.¹

56%

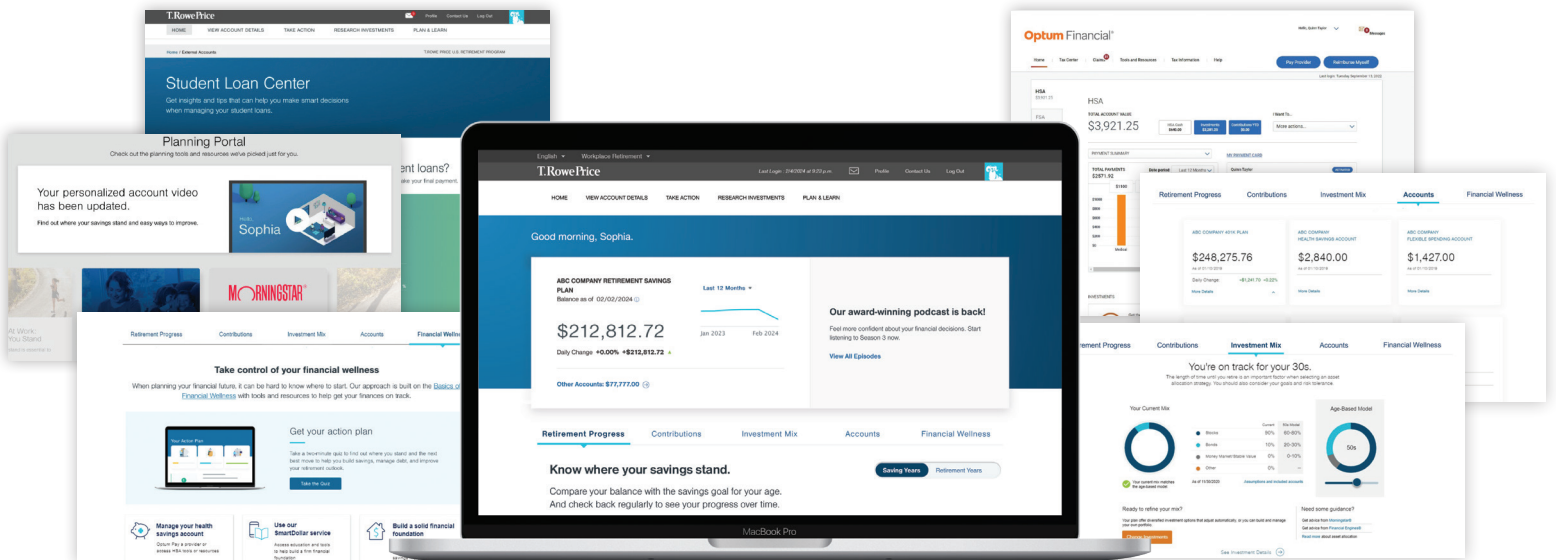
say that financial or money matters/ challenges cause the most stress.²

¹T. Rowe Price Retirement Savings and Spending Study, 2022

²PwC, Employee Financial Wellness Survey, 2022

Integrated Experience

We pair our proprietary solutions with benefit providers to create an integrated financial wellness and retirement experience, bringing greater meaning to the participant's holistic financial picture.



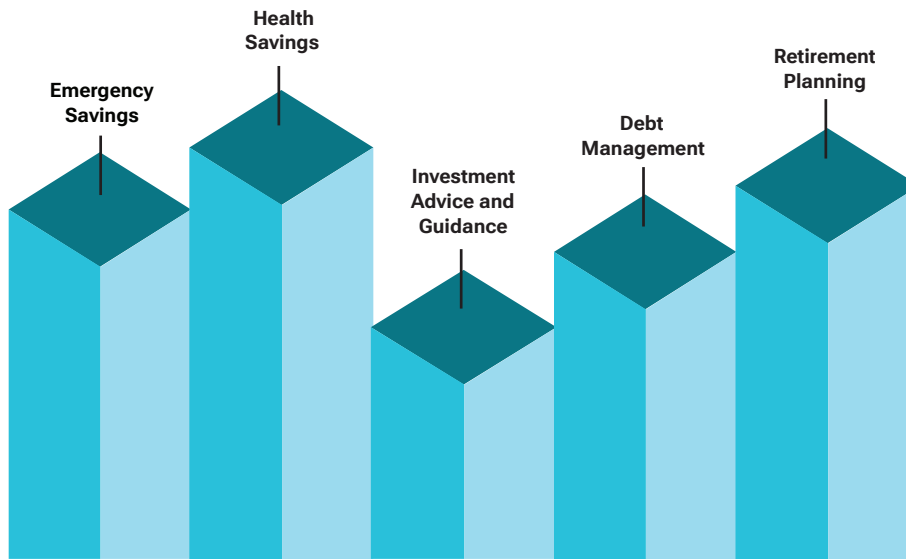
T.Rowe Price



Financial Wellness | Our Solution

Competing Financial Priorities

We address your employees' competing financial priorities and their impact on long-term retirement goals.



Strategic Engagement

Your employees have unique needs, so we offer the right solution, at the right time, in the right way.



Self-Serve Education and Resources



Interactive Assessments and Calculators



Individual Conversations



Automated, Personalized Calls to Action

Further configure the experience by adding on any combination of these optional services.



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For more information, contact your T. Rowe Price representative.

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