



Employee Financial Wellness

 GreenPath, Inc.

GreenPath Background

Counseling Model

“Financial Health Checkup” Pilot

Next Actions

Maria C.
GreenPath Counselor



Presentation Outline

GreenPath Background... Our History

**A non-profit,
501(C)3 since 1961**

61 offices 12 states

**Illinois office for
over 20 years**

**Licensed
Nationwide**



David W.
GreenPath Counselor

GreenPath Background...Our Credentials

**National
Foundation for
Credit Counseling**

**Executive Office
of the US Trustee
for Bankruptcy
Counseling**

**Council On
Accreditation**

**A+ rating with
the BBB of MI**

**Exclusive
CUNA
provider**



NATIONAL FOUNDATION FOR
CREDIT COUNSELING

*Knowing the difference can
make all the difference.*



Our Center Locations



Holistic Counseling & Intervention

Budget Counseling

“Debt Issue” Counseling

Credit Report Reviews

Foreclosure Prevention

Homebuyer Counseling

Bankruptcy Counseling

Reverse Mortgage

Counseling

Rental Counseling

Optional Interventions

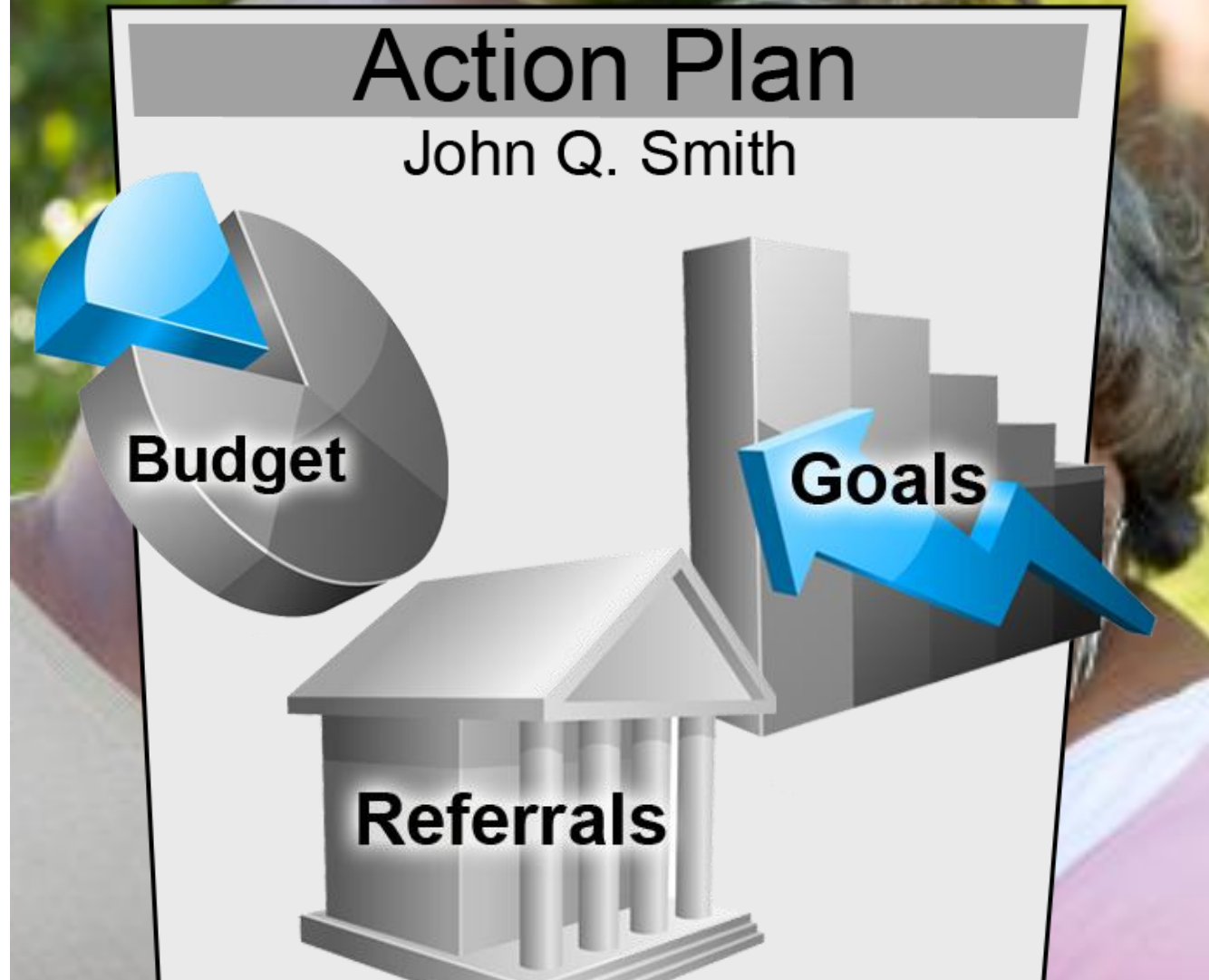


**Core of all of
our services**

**Customized
Goals**

**Probe for
details**

**Provide
Action Plan**



BUDGET CONSULTATION

Employer-Based “Financial Health Checkups”

Can address:

**Credit Report
Review**

**“Mortgage
Checkup”**

**Savings/
Retirement
Questions**

**Debt
Concerns**

Referrals



Responsibilities



Employer / Community Partner

- Publicize ahead of time
- Manage sign-up sheet
 - Provide space
- GreenPath contribution (optional)

GreenPath

- Provide financial counselor(s)
- Provide laptop and handouts
- Add value for each participant





Thank You!

Bill Druliner
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