

## **Exemplary Employers Application Personal Finance Employee Education Foundation**

Please fill in the lines below and press the “submit” button at the bottom.

Name of Person Making Request:

Job Title:

Organization:

Mailing Address:

Telephone/Fax:

Email:

Organization Website:

Evidence of an exemplary financial program:

1. Provides employees an ongoing successful financial education program which includes an emphasis on basic financial literacy through any appropriate medium;

Content: Financial Literacy (Spending Plans, Credit Management, Savings) and  
Financial Advice (Investing, e.g. Retirement)

Programs: Any of the following ongoing programs: Workshops; Seminars; Counseling;  
Telephone; On-line

2. Documents evidence of improvements in employee financial wellness which shows benefits to both the employee and the employer’s bottom line;

Evidence of Impact: Change in Employee Assistance Plan calls; Contributions to 401(k)  
Plans; Absenteeism; Turnover; Productivity