

# DMBA FINANCIAL PLANNING

Empowering employees to save, serve,  
and bless others' lives

**3 OUT OF 4** American workers are worried about money, according to Mercer, and report feeling an increase in financial stress. Of their **top 10** financial concerns, **meeting monthly expenses is first**, and **second is being able to retire**.

DMBA's groundbreaking financial wellness program provides answers to both—we offer everything from fundamental financial coaching to comprehensive retirement planning. Our team of Certified Financial Planners™ and Accredited Financial Counselors® are uniquely qualified to help you achieve lifelong financial security. Our highly trained, in-house staff are unbiased and sell no products. **These services are included in your benefits package and available to you free of charge.**

## Core Financial Principles®

*The building blocks of financial success*



Through our award-winning *Core Financial Principles* program, DMBA's dedicated counselors empower thousands of employees each year to achieve their financial goals. Using a step-by-step process, we coach you and your family through core money concerns such as **building emergency savings, paying down debt, saving for college, and buying a home.**

## Forecasting Your Retirement®

*Preparing you for a rewarding retirement*



Preparing for retirement can be exciting and, done right, can lead to one of the most rewarding chapters in your life. Meet with one of our Certified Financial Planners™ to create a personalized, comprehensive financial plan. This is a critical time to protect your family's retirement assets and avoid potential pitfalls.

Later-career employees and retirees are often bombarded by ads promising guaranteed returns, bigger Social Security benefits and tax-free income in retirement. Some strategies are legitimate. Others can be outright scams. Telling the difference may require a trained eye and unbiased review.

If you are wondering about a retirement strategy you've heard or a product you've been pitched, our experienced Certified Financial Planners™ can offer objective insight and help you address key questions, such as **how your income will be taxed in retirement, which Social Security strategy may be right for you, and how to make the most of your 401(k).**

Your journey towards life-long  
financial security begins with us.





# Financial Planners

INSPIRING EMPLOYEES TO ACHIEVE LIFELONG FINANCIAL SECURITY



**7 CERTIFIED FINANCIAL PLANNERS™**

**100+** YEARS OF COMBINED **EXPERIENCE**

## 24 PROFESSIONAL DESIGNATIONS



Certified Financial Planners™



Behavioral Financial Advisor™



Chartered Financial Consultants®



Accredited Behavioral Finance Professional™



Accredited Financial Counselors®



DACFP Blockchain and Digital Assets Certificant

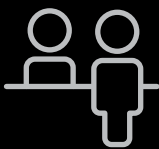


Financial Therapy Certificants

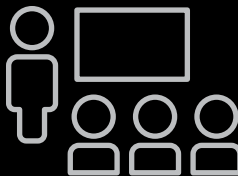


Philanthropic Solutions in Financial Planning Certificant

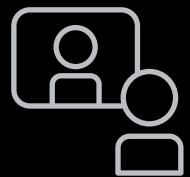
## HOW



Individual consultations



Group workshops



Online education

Financial Coaching • Financial Therapy • Retirement Planning

SCHEDULE YOUR CONSULTATION OR WORKSHOP TODAY.



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