Concern

Money Coaching

With Guidance from Financial Experts



Your story is unique… and so is your financial journey.

Through Concern, you have access to coaches with more than 20 years of experience in personal finance. Your coach will take the time to understand your situation, help you prioritize what matters most, and give you clear steps you can act on right away.

Your benefit: Two free 30-minute consultations per issue, per year with a financial coach, easy scheduling, adaptive AI chat support, and a robust library of video courses, articles, and calculators.

MONEY FUNDAMENTALS

- **Money Management**
  Budgeting, debt reduction, and managing paycheck stress.
- **Tax Basics**
  Tax questions, deductions vs. credits, and filing guidance.
- **Goal Setting & Action Planning**
  Personalized steps to stay on track with short and long-term success.

PLANNING AHEAD

- **Investment Basics**
  401(k), employer match, and getting started with investing.
- **College Planning**
  Saving for college, 529 plans, and student loan guidance.
- **Retirement Planning**
  IRA rollovers, Social Security, Medicare, and long-term readiness.
- **Financial Well-Being Score**
  Insight into your current picture and how to improve it over time.

LIFE & PROTECTION

- **Preparing for the Unexpected**
  Managing surprise expenses and protecting your financial future.
- **Identity Protection**
  Safeguarding personal information and reducing risk of identity theft.
- **Life Events & Transitions**
  Support for a new job, caregiving, divorce, or relocation.

Feeling stressed about money?

You don't have to figure it out alone — support is available for whatever you're facing now or down the road.

Call 800-344-4222 and ask to be connected to a Money Coach or go to app.concernhealth.com

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