Employee Financial Wellness:

Messaging Toolkit

📣 Campaign Name Suggestions

• Stronger Finances, Steadier You

• It’s Okay to Ask: Financial Wellness Starts Here

• Secure Today. Confident Tomorrow.

• Support That Makes Sense (and Cents)

📨 1. General Touch Base Email

Subject Line: You’re not alone in navigating today’s economy

We know this is a challenging time. Whether you’re feeling uncertain about expenses, overwhelmed by planning ahead, or simply unsure where to start—know this: you are not alone.

As part of our commitment to your overall well-being, we’re focused on supporting your financial health.

✅ [link to resource or assessment]
✅ [link to resource or assessment]
✅ [link to resource or assessment]

If you’re feeling stuck, even one small step can help. We’re here to walk it with you.

🧭 2. Message from a Leader (Empathetic + Inspirational)

Subject Line: A personal note: Supporting you where it matters most

As your [manager / leader / HR partner], I want to acknowledge how much invisible weight many of us are carrying right now. Financial stress shows up in ways that are easy to miss—difficulty sleeping, feeling distracted, or just trying to get through the day.

We want to make sure you feel supported. That’s why we’re offering tools and resources to help you navigate this season with confidence.

No judgment, no one-size-fits-all advice—just real support, tailored to you.

📍 [link to resource or assessment]
📍 [link to resource or assessment]
📍 [link to resource or assessment]

Let’s take this step forward—together.

🎯 3. Just-in-Time Tip or Resource (Proactive Support)

Subject Line: Feeling financial pressure? This tool might help

If you’ve been thinking about pausing your 401(k) or putting off budgeting “until things calm down”, you’re not alone. Many people are trying to balance immediate needs with long-term goals.

Here are resources that can help:

🔹 [link to resource or assessment]
🔹 [link to resource or assessment]
🔹 [link to resource or assessment]

Even small actions—like checking in on your financial health—can help you regain a sense of control.

🧡 4. Empathy-Led Slack/Teams Message (Manager or HR)

Just a quick reminder: It’s okay if things feel financially overwhelming right now. Our [Employee Financial Wellness program] is here to support you—confidentially, and at your pace.
Start here if you’re not sure what you need: [link to resource or assessment]
You’re not alone—and you don’t have to figure it all out on your own.

📊 5. Campaign or Newsletter Blurb (Weekly Highlight)

Headline: Your financial health matters

Employees who feel financially confident are more focused, creative, and engaged at work. We want that for you.

➡ Start with this quick financial well-being check-in
➡ Meet with a coach, no matter your income or goals
➡ Learn practical tips to reduce financial stress today

We believe that investing in your financial wellness is investing in \*you\*.

6. For Managers to Share 1:1 (Check-In Message)

I know financial conversations aren’t always easy, but I want you to know it’s okay to bring it up. If there’s stress impacting your focus or energy, I encourage you to take advantage of our [financial wellness resources]. I’m here to support however I can—and want you to feel confident and cared for at work.