MONEY MANAGEMENT EDUCATORS
Leaders in Financial Wellness

Complimentary financial education for your employees.

Our Group

Since 1989, **Money Management Educators** has been providing our interactive workshops for corporations across the United States—both large and small. We are passionate about financial wellness education and are committed to teaching others how to take ownership of their financial future.

Our Services

We provide our educational services at no cost. As a supplemental employee benefit, our **Group Workshops** and **Personal Education Sessions** have proven to help employees implement real change in their lives through a better understanding of time-tested wealth accumulation and protection principles and how these can impact their overall financial well-being.

Our Instructors

Our network of **Educators** are highly qualified financial services professionals, who dedicate a portion of their time to offer our educational programs.
Our Instructors are selected from the top of their field.

How everybody wins

The Sponsoring Employer

- Add Personal Financial Education to your list of benefits.
- Get third-party support for your 401(k) and other company plans.
- Help fulfill ERISA requirements to educate your employees.
- Eliminate risk of sales pitch from outside presenters.

Your Employees

- Get access to clear financial information from reputable sources.
- Learn in a comfortable, group environment at the worksite.
- Access to complimentary individual consultations.
- Develop a personalized approach to financial success.

Our Instructors

With our "Give First" program* Instructors are well-positioned for future clients in a unique way that virtually ensures a problem-free transition from education to implementation.

*With our "Give First" program, Instructors provide complimentary education-only workshops, and complimentary education-only Personal Education Sessions.

Workshop Topics

Foundations for Your Financial Future

In this session, attendees will learn how to budget their money and manage their debt; protect against risks like income disruption; and manage the stock market's ups and downs.

Tax-Favored Investing

Even basic tax laws are ever-changing making it difficult for the average employee to plan properly. This session provides a solid foundation for proper long-term tax conscious planning with a Macro Balance Strategy.

Saving & Investing 2.0

This session is designed for those in the "**Accumulation Phase**" of life. We help develop a realistic overview of how to set and reach financial goals as well as an orientation to the various elements of building one's financial house.

Getting It & Keeping It

This discussion is designed for those closing in on their retirement years. We touch on the particular problems associated with the "**Conservation Phase**" of life and provide some insights into the changes necessary to succeed during this period.

Estate Planning – Wills, & Trusts

This workshop is for anyone interested in protecting his or her assets from unnecessary loss, taxation, and erosion. We discuss the benefits of proper estate planning, the issues regarding Wills and Living Trusts as well as the Probate Process.

What HR professionals are saying*

> Your services help advance Adobe's commitment to helping our employees move closer to their financial goals.

Helen K. Hauge, Adobe
San Jose, CA

> MME ended my frustration...their unbiased information comes with no 'sales pitch' attached.

Jean Marie Dillon, Northwest Hospital
Bellevue, WA

> ...With over 110 seminars...the feedback we receive on your presentations is always great!

Jim Bearden, Boeing
Seattle, WA

> The feedback that we regularly receive from employees is extremely positive and the individual sessions held are a valued additional benefit."

Susan L. Richman, Johnson Controls
Plymouth, MI

*Excerpts from letters received by HR professionals represent their personal experiences only, and do not constitute official endorsements of money management educators by the companies referenced.

Reach out for more information.

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MME MONEY MANAGEMENT EDUCATORS
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MME is an education-only division of New York Life.

America's leading corporations have called on us

- Adobe Systems
- Boeing/IAM
- Cordiant Software
- Cohesity
- Hewlett-Packard
- Johnson Controls
- KLA-Tencor
- Logitech
- National Semiconductor
- Nokia
- Outdoor Research
- Spirent
- Sun Microsystems

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