

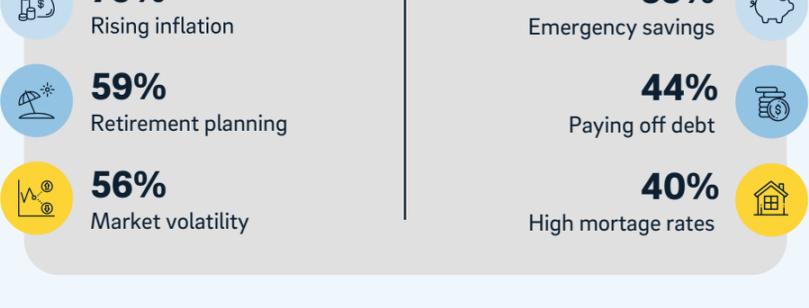


The Well-being Equation: Helping Employees Thrive in Uncertain Economic Times

IMPACT OF ECONOMIC UNCERTAINTY

72% of employees are stressed about finances

Key Drivers



Impact on Employees



11.4 HOURS lost in productivity per employee per week

Financial stress costs U.S. employers MORE THAN \$4 Billion* per week

Financial Stress is Shifting Priorities

Financial wellness benefits are the number 1 most desired benefit

TOP 3 BENEFITS EMPLOYEES WANT:



Employees are Reevaluating Work

Increased stress is fueling the Great Resignation:



Leading to Big Challenges for HR teams



THE STATE OF EMPLOYEE FINANCES

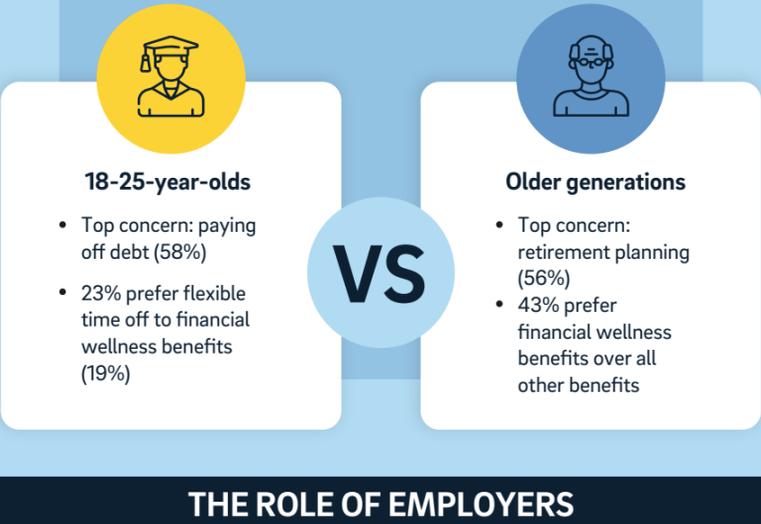
Financial Literacy is in Crisis

A sharp decline in financial literacy



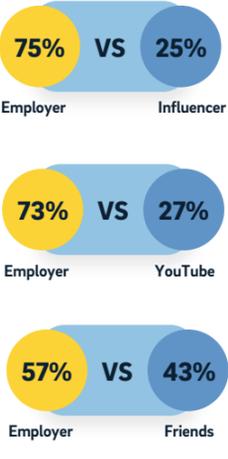
Rising inflation is leading 68% of workers to increase their retirement contributions

Financial Attitudes by Generation

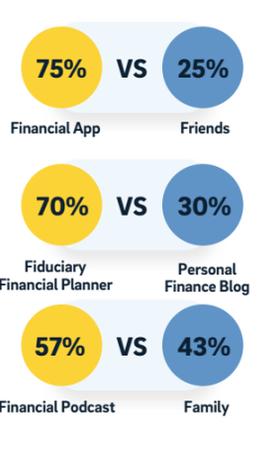


THE ROLE OF EMPLOYERS

Employers trusted for financial advice

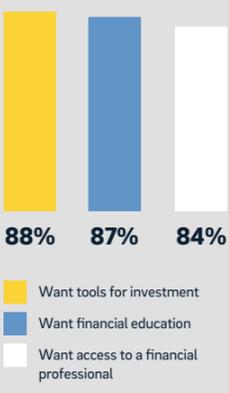


Other sources of financial advice



How Employers Can Help

88% of employees expect employers to support them with their finances



Impact of Better Benefits

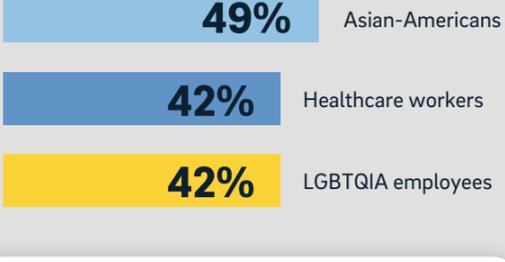
95% of employees say enhanced employer provided benefits would have a positive impact



Mixed Response on Safety and Belonging

89% of employees say their company handles DE&I issues well

However, **one-third** still do not feel completely safe or comfortable at work



36% **VS** **28%**

On behalf of BrightPlan, CITE Research surveyed 1,500 knowledge workers at companies with 1000+ employees in the U.S. between April and May 2022. This included a mix of HR decision-makers and employees in various industries including technology, healthcare, financial services, education, manufacturing and energy.

*Disclosure: Assumes there are 97,983,000 knowledge workers in the U.S. with an hourly wage of \$36.68. Source: Federal Reserve Economic Dataset. For more information, see the full report.