Benefit experiences that help create and protect financial wellness.

MEETING FINANCIAL WELLNESS CHALLENGES TOGETHER
VI Vision And Mission and Five Pillar Strategy

Prudential’s Veterans Initiatives Office (VI) primary roles are to articulate the vision, establish focus and act as the primary catalyst to drive collaboration across the enterprise on veteran activities. The VI Office will represent Prudential externally and provide leadership internally to ensure that all veterans initiatives are operating in parallel, to ultimately help Prudential achieve the maximum impact for veterans, inside and outside the company.

Vision Statement

To distinguish Prudential as a preferred employer for veterans, a community leader in supporting veteran service organizations and initiatives, and a national leader in developing and sharing best practices for corporate veteran programs.
A PUBLIC – PRIVATE PARTNERSHIP

- An articulated need
- Two trusted brands
- A shared desire to help veterans
- The technical know-how to help
- The capability to have a real impact
- Complimentary capabilities
- A bias towards action!
HOW WE GOT STARTED

- Prudential’s focus on Financial Wellness
- Robust and expanding relationship with the USO
- USO’s focus on transitioning Veterans (RP-6)
- Connecting the dots
- Customization of Pathways Material for Military Audience (Digital and Seminars)
- Pilot at Ft. Bliss
- Creation of “Pathways in a box”
FINANCIAL WELLNESS ENGAGEMENT PROGRAMS

ON-SITE LEARNING

DIGITAL LEARNING (INCLUDING WEBINARS)

DELIVERY OF CONTENT
FINANCIAL EDUCATION FOR ACTIVE DUTY, TRANSITIONING SERVICE MEMBERS, VETERANS AND THEIR FAMILIES

- Comprehensive range of topics
- Tailored education
- Military benefits integration
- Conducted at Pathfinder & USO sites
- Presented by local specially trained Prudential financial professionals in a non solicitous manner
- No cost
- Turn-key implementation
- Integrated into member’s action plans
ON-SITE LEARNING: PRUDENTIAL PATHWAYS℠

1-HOUR SESSIONS
Total of 29 topics to cover a wide range of financial wellness needs:
- The Basics
- Retirement
- Taxes and Estate Planning
- Asset Protection
- Specialty – Demographic focused

NEW BEGINNINGS
Deep dive for members transitioning out of the military into retirement or another employer
- Transitioning Successfully into Retirement
- Managing Employment Change

SEMINAR SERIES
Series of seminars covering many aspects of financial wellness:
- Understanding the Fundamentals of Financial Wellness
- Building Your Road to Retirement
- Protecting Yourself and Your Loved Ones
- Creating a Solid Plan for the Future
DIGITAL LEARNING: FINANCIAL WELLNESS CENTER

BRINGING THE LEARNING EXPERIENCE TO LIFE

- Interactive & insightful tools
- Short & relatable educational articles
- Engaging videos
- Personalized experience
- Monthly webinars
- Metrics reporting provided
- Engagement support
- Integrated into member’s action plans
DIGITAL LEARNING: FINANCIAL WELLNESS CENTER

SELF-ASSESSMENT TOOL
Provides members with:
- Simple 20-question survey
- Provides actionable steps
- An engaging and visual experience

BUDGETING TOOL
Members can manage day-to-day finances by:
- Managing their budget
- Consolidating bank & credit accounts
- Tracking spending by category
SUCCESS IN 2017

ONSITE LEARNING - POSITIVE PILOT EXPERIENCE

2 military specific New Beginnings workshops created

6 successfully executed Pathways events

95 participants over 7 month pilot

100% overall satisfaction rate

Low rate of attrition for USO programs

Survey source is from USO attendees
POSITIVE SERVICE MEMBER EXPERIENCE

100% were satisfied overall with the program

99% rated the relevance of the material excellent

56% requested a one-on-one meeting with a Prudential Pathways Speaker for further guidance

What attendees are saying

“I will put what I learned to use as soon as today.”
– Fort Bliss Pathways Participant

“Good start for those of us looking at financial planning for the first time, plus addressing financial issues that may come up w/separation/retirement.”
– Fort Belvoir Pathways Participant

“Informative presentation that makes you think of all things to consider.”
– Fort Bliss Pathways Participant

Survey source is from USO attendees
EXPANSION IN 2018

HOW THE USO & PRUDENTIAL ARE EXPANDING THEIR FINANCIAL WELLNESS REACH IN 2018:

- Launching on-site learning to expanded USO field
- Customizing all in person seminars
- Collaborating to increase participation and reduce attrition
- Refining marketing strategy to reach more members
WHEN FINANCIAL WELLNESS WORKS, WE ALL BENEFIT

HOW THE USO & PRUDENTIAL PARTNERS

- Train local USO & Pathfinder site managers
- Determine specific needs of members
- Customize content to military audience & their families
- Develop highly effective engagement plan, including action plans
- Support implementation of program & track metrics
- Keep program evergreen
- Weekly touchpoints
Prudential Pathways seminars are provided by a Prudential Financial Professional with The Prudential Insurance Company of America and are not intended to market or sell any specific products or services. Offering this seminar does not constitute an endorsement of Prudential products or services in any way.

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