



THIS WEEK'S Huddle Topic

Learn All About Financial Wellness from the Roadmap to Wellness

Activity



PREPARATION TIPS

Read through the Huddle before facilitating.

Before the session, throw 15-20 coins around floor of the room.

Today we are going to talk about a topic that most of us worry about all the time - our financial wellbeing.

1. **Ask:** "Did anyone notice the change on the floor when you walked in?"
2. **Say:** "Sometimes a learning opportunity can happen when you least expect it. I threw change on the floor as a reminder that 'change is all around us.'"
3. **Say:** "Today I truly hope this short huddle helps you learn all about how to change from being worried about your finances to knowing where you can go to get the support and help you need."

Huddle Content

At Moorings Park we encourage our partners to use resources for financial wellness.

1. With the [HealthJoy app](#), full-time partners have access to the Employee Assistance Program (EAP), including financial services referrals and legal consultations.
2. Partners enrolled in the Moorings Park 403(b) or ROTH retirement plans can speak to a retirement plan advisor. [Click here](#) to learn more about options
3. All partners are invited to attend webinars and on-site events for information on:
 - a. Monthly and Annual Budgeting
 - b. Savings (Emergency and Projected Expenses)
 - c. Debt Management
 - d. Retirement Savings (Contributing and the Importance of Investing to the Match)

Culture Connection

- ☑ Our Vision is to be "the premier provider in Southwest Florida of services, facilities and health support to enable successful aging."
- ☑ How does your drive for financial wellness here help Moorings Park strive to become a premier provider?

Announcements

Please take the monthly survey to enter for a chance to win a \$30 gift card!
Follow the QR code on the bottom of this page to find this month's survey.

Quote

"As long as they are well-intentioned, mistakes are not a matter for shame, but for learning." – *Entrepreneur / CEO Margaret Heffernan*

QR to
Partner
Huddle
Resource
Page



MONTHLY SURVEY!
This QR code will take you
our monthly survey, complete
the survey and enter to win a
\$30 gift card

