



DMBA



Financial Planners

INSPIRING EMPLOYEES TO ACHIEVE LIFELONG FINANCIAL SECURITY



7 **CERTIFIED**
FINANCIAL PLANNERS™

100⁺ YEARS OF COMBINED
EXPERIENCE

24 PROFESSIONAL DESIGNATIONS



Certified
Financial Planners™



Behavioral
Financial Advisor™



Chartered
Financial Consultants®



Accredited Behavioral
Finance Professional™



Accredited
Financial Counselors®



DACFP Blockchain and
Digital Assets Certificant

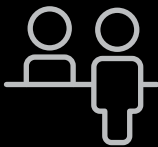


Financial
Therapy Certificants

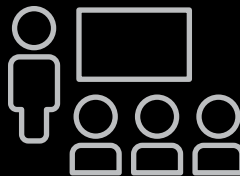


Philanthropic Solutions in
Financial Planning Certificant

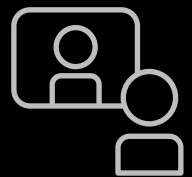
HOW



Individual
consultations



Group
workshops



Online
education

Financial Coaching • Financial Therapy • Retirement Planning

SCHEDULE YOUR CONSULTATION OR WORKSHOP TODAY.



800.777.3622, ext. 5627
email: finplanning@dmbs.com
www.dmba.com/FinancialPlanning



DMBA FINANCIAL PLANNING

Empowering employees to save, serve,
and bless others' lives

3 OUT OF 4 American workers are worried about money, according to Mercer, and report feeling an increase in financial stress. Of their **top 10** financial concerns, **meeting monthly expenses is first**, and **second is being able to retire**.

DMBA's groundbreaking financial wellness program provides answers to both—we offer everything from fundamental financial coaching to comprehensive retirement planning. Our team of Certified Financial Planners™ and Accredited Financial Counselors® are uniquely qualified to help you achieve lifelong financial security. Our highly trained, in-house staff are unbiased and sell no products. **These services are included in your benefits package and available to you free of charge.**

Core Financial Principles®

The building blocks of financial success



Through our award-winning *Core Financial Principles* program, DMBA's dedicated counselors empower thousands of employees each year to achieve their financial goals. Using a step-by-step process, we coach you and your family through core money concerns such as **building emergency savings, paying down debt, saving for college, and buying a home.**

Forecasting Your Retirement®

Preparing you for a rewarding retirement



Preparing for retirement can be exciting and, done right, can lead to one of the most rewarding chapters in your life. Meet with one of our Certified Financial Planners™ to create a personalized, comprehensive financial plan. This is a critical time to protect your family's retirement assets and avoid potential pitfalls.

Later-career employees and retirees are often bombarded by ads promising guaranteed returns, bigger Social Security benefits and tax-free income in retirement. Some strategies are legitimate. Others can be outright scams. Telling the difference may require a trained eye and unbiased review.

If you are wondering about a retirement strategy you've heard or a product you've been pitched, our experienced Certified Financial Planners™ can offer objective insight and help you address key questions, such as **how your income will be taxed in retirement, which Social Security strategy may be right for you, and how to make the most of your 401(k).**

Your journey towards life-long
financial security begins with us.

