YOUR MONEY LINE | Navigate Wellbeing Solutions

Make financial wellness a growth advantage

Help clients get more from Navigate with personalized financial guidance and practical money tools. YML helps you win business, deepen relationships, and create revenue, with a dedicated team to help you deliver.



wHAT THE NAVIGATE TEAM GAINS

Win more business
Strengthen your wellbeing offering with personalized financial support.

Strengthen client retention
Help clients address money stress and make benefits easier to use.

Create additional revenue
Offer preferred partner pricing and earn revenue through resale.

Deliver more without doing more
YML supports launch and engagement, plus coaching and client success.

Give employees more reasons to engage
Bring practical money resources into existing Navigate programs.

Demonstrate value
Track registrations and engagement with aggregate program reporting.

A STRONGER FINANCIAL WELLBEING EXPERIENCE

Employees receive confidential, one-to-one guidance from AFC® or CFP® credentialed Financial Guides, plus an all-in-one money app and personalized education. Support covers budgeting, debt, credit, benefits, student loans, and life changes. YML resources can complement Navigate's existing wellbeing programs and resource hub, supporting clients across public and labor, manufacturing, healthcare, and professional services.

WHAT ABOUT COST?

Your Money Line is a paid, employer-sponsored benefit with preferred partner pricing. Navigate can refer clients without an upfront purchase or explore bulk-purchase resale options with deeper discounts. The YML team can help you understand the options and prepare a proposal around each client's needs.

WHEN TO BRING YML INTO THE CONVERSATION

Listen for financial stress, benefits confusion, low engagement, or HR fielding personal money questions. Introduce Your Money Line during prospect meetings, quarterly business reviews, and renewals. Our team can help assess fit and support the next conversation.

Ready to bring financial wellness to your clients?

Contact Caitlin Garrity for a partner consultation call today

caitlin.garrity@yourmoneyline.com