



FINANCIAL WELLNESS

**You help your clients navigate tomorrow.
We help them navigate today.**

Category	RIA	Your Money Line	How we help
Core focus	Long-term investment & retirement planning	Day-to-day money questions & behavior change	Handles short-term financial needs so you can focus on asset growth
Scalability & capacity	Advisor time is finite	Unlimited access to certified financial coaches	Increases capacity without scaling headcount
Participant engagement	Investment-focused, often episodic	Engages participants in ongoing financial conversations	Boosts participant contributions, improving plan health
Plan sponsor value	Investment returns and plan structure	All-in-one financial wellness program	Adds a unique, RFP-proof differentiator for plan sponsors
Reporting & insights	Investment reports only	Insights into plan sponsor clients' financial health	Strengthen your connections and recommendations
Revenue structure	Fees from AUM or plan sponsors	Preferred pricing & revenue allowance	Retain control of margins

**YML participants contribute 11% more to
their retirement after 1 year**

Want to learn more? Contact brennan.beausir@yourmoneyline.com