

eFinancial Connections

"Connecting the Dots of Your Financial Life"

Corporate Benefit

With heightened public awareness about the importance of personal financial management and saving for retirement the time has never been better to establish a new benefit to help you and the people in your organization.

eFinancial Connection's wealth management system provides people in your organization a web-based benefit that provides users with a single point of access to personal financial information, tools and financial planning reports to help manage their wealth. It is a personal wealth management system dedicated to helping an organization attract, reward and retain productive people.

The wealth management system is a benefit solution which provides users with their own secure Personal Financial Homepage where they can view all their financial assets, liabilities, insurances and benefit data from one consolidated application. The system not only provides an integrated framework for users' personal wealth management but also meets your organization's need to provide competitive benefits. Improved benefits enable organizations to drive employee loyalty and effectiveness. Furthermore, the system delivers control to the user and incorporates an individual-centric on demand benefit that is web-based. This enables users to successfully organize and monitor their wealth across all touch points without necessarily including your organization's benefit personnel.

From a User Perspective

The wealth management system greets users with a single consolidated view where they can get the most up-to-date information on their financial assets (investment portfolios, retirement plans, stock options, bank accounts, etc), liabilities and insurances. The system allows users to better understand their financial affairs. Financial accounts are still held at outside financial institutions but the data is displayed in their own secure Personal Financial Homepage, right on their desktop and accessible from any web-connected computer in the world. This convenience saves users valuable time.

Technology

From a technology perspective, building and constantly upgrading homegrown benefit solutions is costly. However, the wealth management system is a completely out-sourced benefit. There isn't software to separately install and administer on any participant's desktop. The wealth management system is web-based. The technological platform uses a secure, role-based authentication system with a single source login.

Support

eFinancial Connections supports every stage of this benefit program lifecycle from eligibility, enrollment, processing, reporting – resulting in enhanced communication, improved service and

Kevin A. Carroll, President

The Carroll Financial Building
2211 River Road • Maumee, OH 43537
Bus: (419) 215-7325 • Fax: (419) 754-2319 • KevinCarroll@efinancialconnections.com
www.efinancialconnections.com

eFinancial Connections

"Connecting the Dots of Your Financial Life"

employee satisfaction. Answers to questions are tailored to support the unique needs of your organization. We provide an efficient and intelligent interaction with the people in your organization when servicing them with this benefit.

Differentiation

eFinancial Connections differentiates itself from other financial planning programs offered by organizations by offering the following areas of focus:

- **Personalized Service** – Our culture delivers a high level of personalization of the overall client experience including ongoing communication with participants by conducting group meetings including meetings with terminating or retiring employees to counsel them regarding their fund distribution options as well as one-on-one consultations as requested.
- **Independence** – We are independent and can consider the offerings from a variety of different companies, to determine which ones best meet the goals and requirements of a particular individual.
- **Empowerment** - Through web-based application participants have sole discretion over design and configuration of their Personal Financial Homepage in a timely and cost effective manner.
- **Successful Implementation** –We understand that a benefit solution that doesn't drive loyalty to the organization isn't optimal. Therefore, every effort is made to create an experience that is successfully attributed back to your organization.

eFinancial Connections delivers the most flexible benefit solution to help your organization's people manage their wealth in the market today.

Kevin A. Carroll, President

The Carroll Financial Building
2211 River Road • Maumee, OH 43537
Bus: (419) 215-7325 • Fax: (419) 754-2319 • KevinCarroll@efinancialconnections.com
www.efinancialconnections.com

Securities offered through Sigma Financial Corporation • Member FINRA/SIPC