

Financial Wellness Dashboard

Clients currently selected

INGWIN

Plans currently selected

664093  
664094  
664095

Data updated through: 06/30/2021

Client ID (Long Client ID)

All

Plan ID

Multiple values

View **active** participants only?

- ☒ No, I want the data to include all participants  
☐ Yes, I'd like the data to only include participants that are currently active

View data for **caregivers** only?

Caregiver status is from the Financial Wellness assessment only. As such, when applying this filter all of the data will be based on only those participants that completed the assessment.

- ☒ All participants  
☐ Caregivers only  
☐ Non Caregivers

# Financial Wellness

06/30/2021



How do your employees feel about their current financial situation?

Your employees



Voya book of business



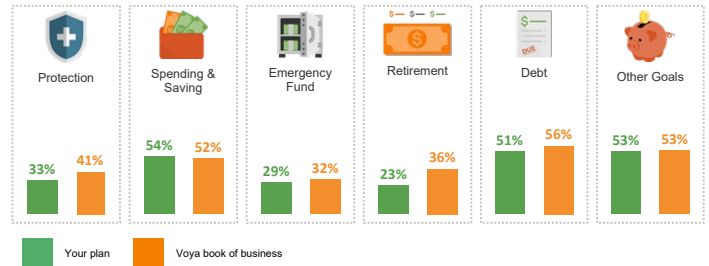
1 not confident 10 very confident

55% have a financial confidence of 7 or more  
(Voya book of business: 54%)



Percent of employees on track by pillar

40% of your employees' pillar scores are green  
(Voya book of business: 45%)

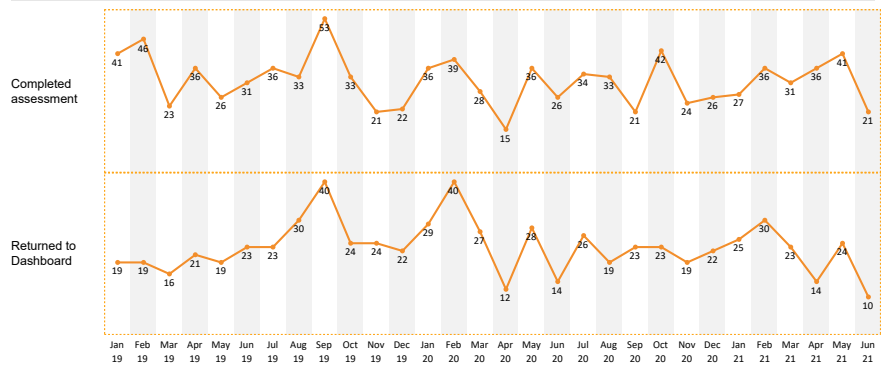


Engagement

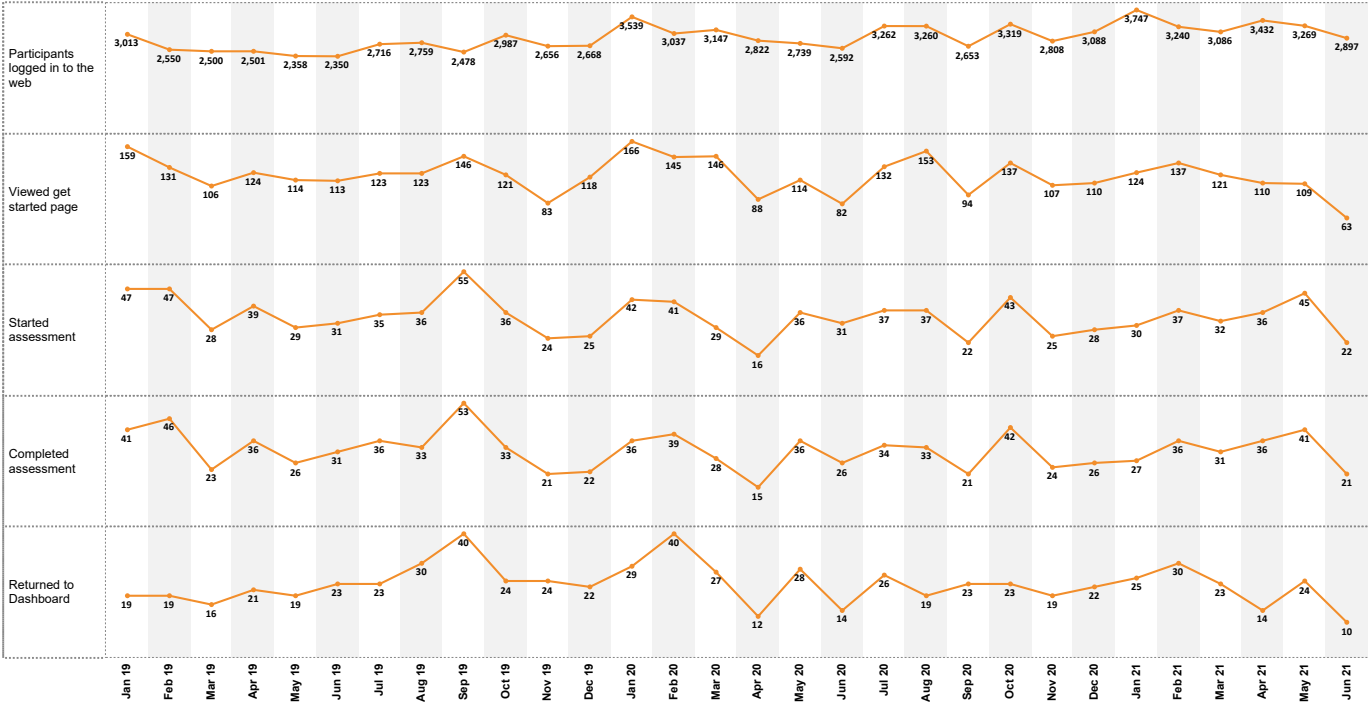
	# of participants	% of participants	Voya Book of Business
Started Financial Wellness assessment	909	--	--
Completed assessment and viewed results	822	90%	89%
Viewed dashboard after completing assessment	721	88%	84%



Trending



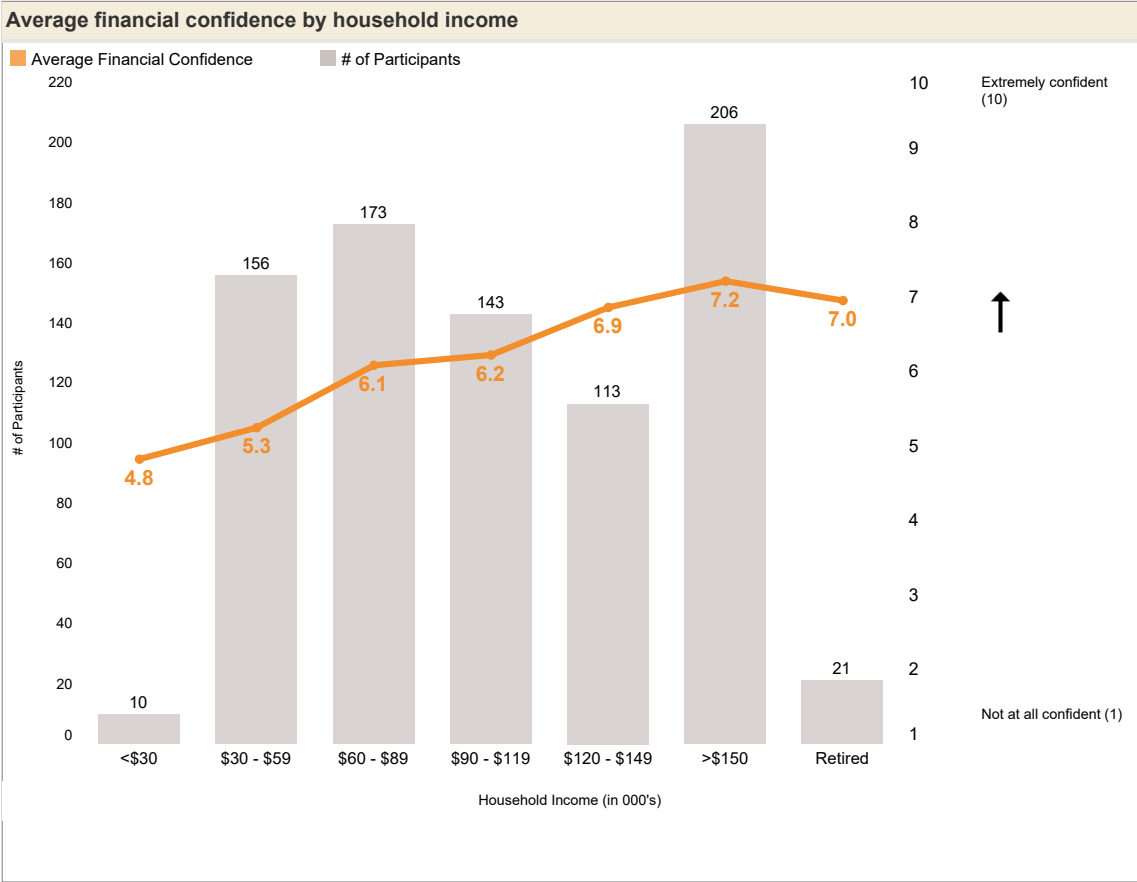
# Engagement trending by month



# Financial confidence

**7**  
Median  
Financial  
Confidence

**6.3**  
Average  
Financial  
Confidence



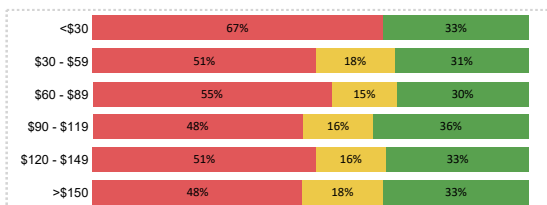
# Score distribution by pillar



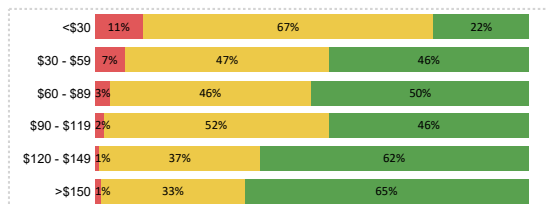
# Score distribution by pillar and household income



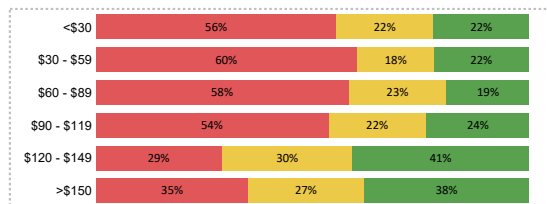
## Protection



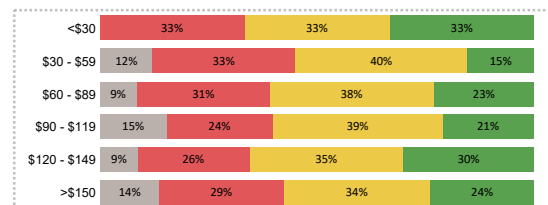
## Spending & Saving



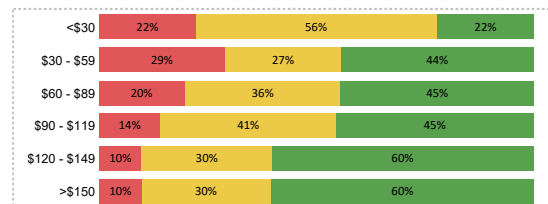
## Emergency Fund



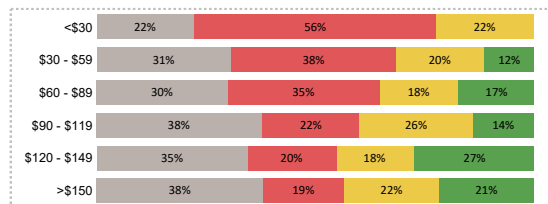
## Retirement



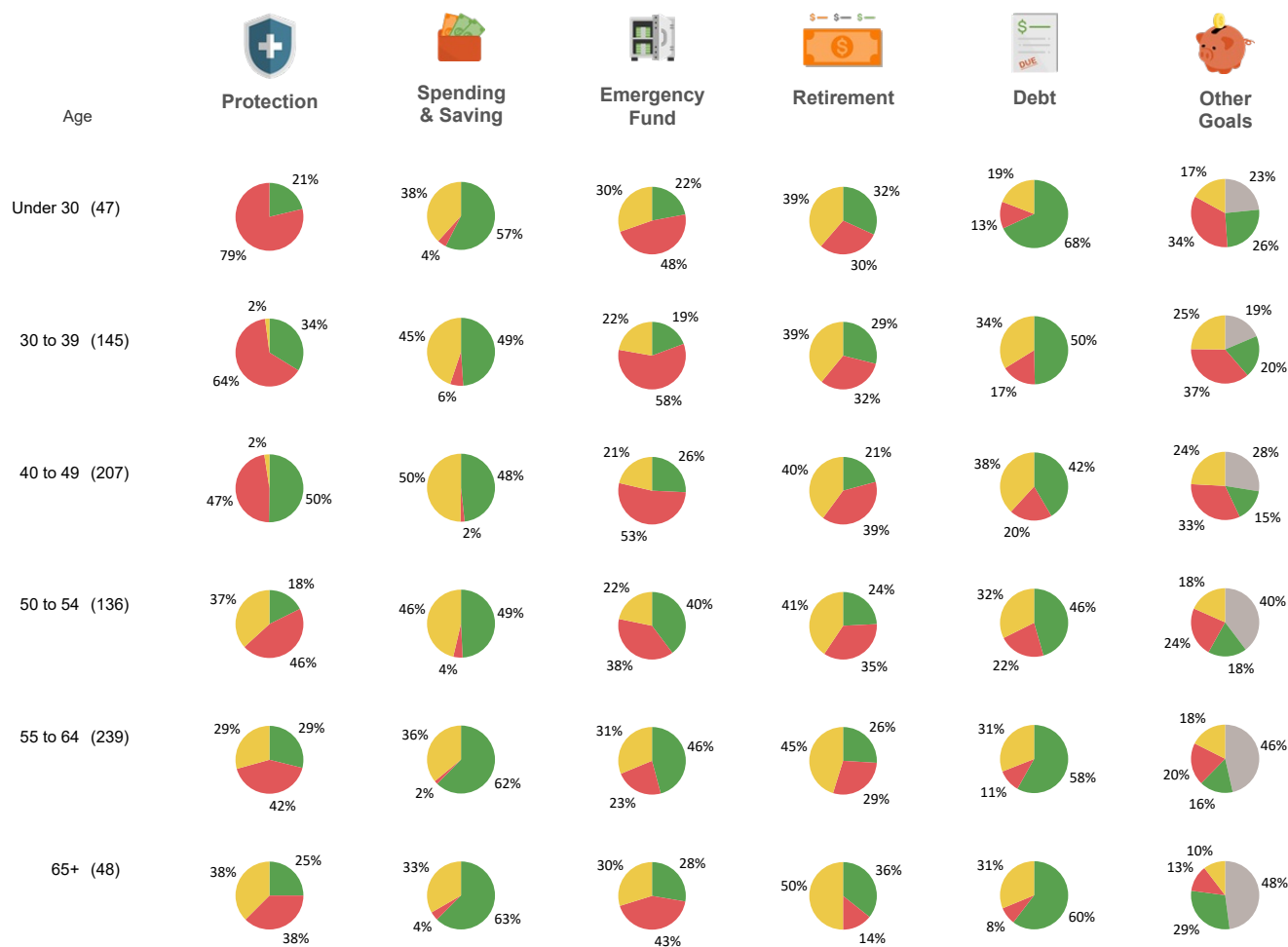
## Debt



## Other Goals

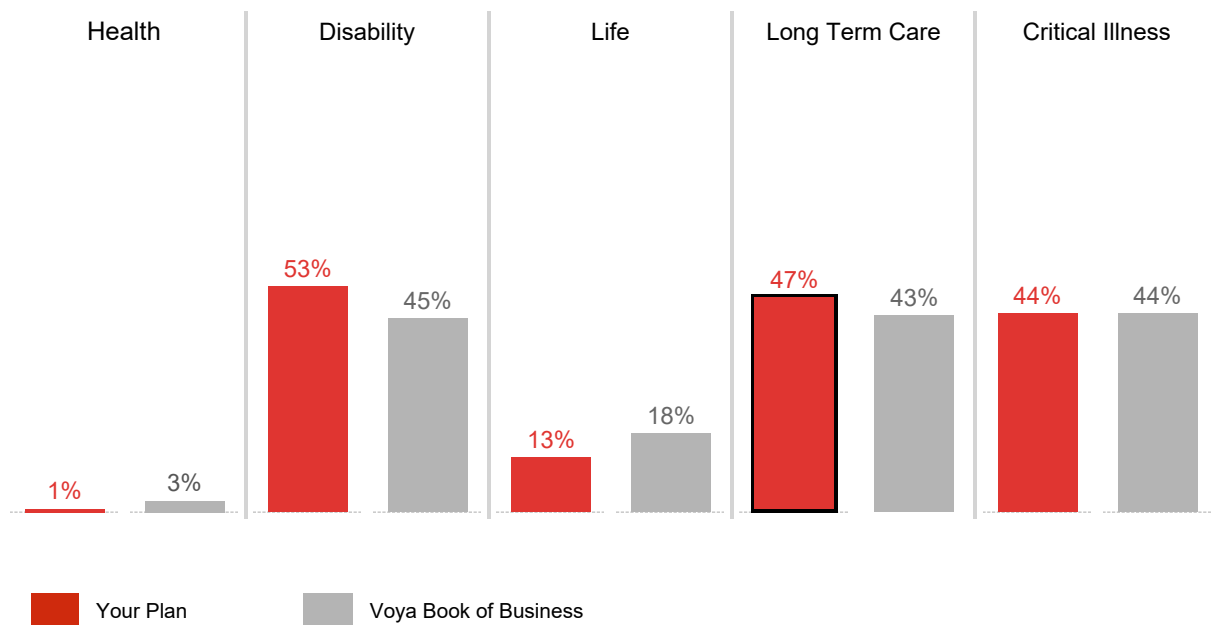


# Score distribution by pillar and age



# Protection pillar summary

## Percent off track by protection type

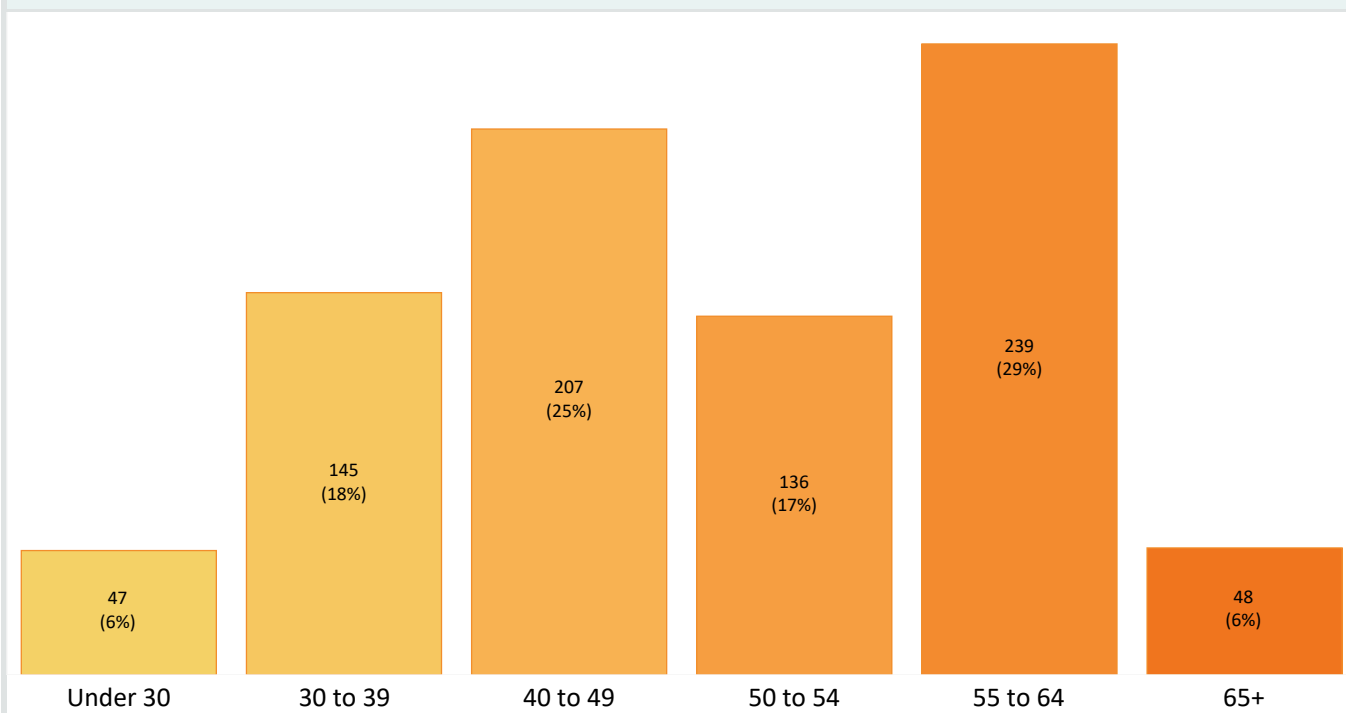


**Notes:**

- Health: includes employees who are age 65 or older without health insurance or Medicare with a Medicare Supplement.
- Disability: does not include employees who are retired.
- Life: only includes employees with dependents.
- Long term care: only includes employees who are age 50 or older who said they don't have coverage and are not prepared to cover expenses through another source if the need arises.
- Critical illness: only includes employees who are age 50 or older who said they don't have coverage and are not prepared to cover expenses through another source if the need arises. Off track metrics for Disability and Life could be understated as those who have these coverages may not be adequately insured. Assessment and scoring enhancements are in the pipeline to address this.



### Completed Assessment by Age



FW Dashboard Engagement Summary

737 participants viewed the dashboard in total



Resource Center Link	
ExploreLifeStages	63
ExploreTools	72
ExploreTopics	14

Custom Resource Center Link	

**-Data Footnotes-**

\*All data in dashboard is from inception. The only exception to this is the engagement trend graphs which reflect usage starting January 2019.

\*Voya Benchmark data is based on all Voya plans that have used Financial Wellness (VIPS and EASE, regardless of market)