



## **Chat Transcript: The WELCOA Pulse How to Build an Effective Financial Wellness Program**

14:01:08 - Nichole:  
Ohio

14:01:10 - Lori:  
Welcome from Papillion, NE!

14:01:10 - Jillian:  
Omaha, NE

14:01:11 - Stephanie:  
Hello from Little Rock Arkansas

14:01:12 - Alma:  
Joining from Sacramento, CA

14:01:13 - Tammy:  
Cedarburg WI, near Milwaukee

14:01:16 - Leslie:  
Hello! I am joining from Houston, TX

14:01:16 - Nicole:  
Hello from Chico, CA

14:01:17 - Rachel:  
Cincinnati, OH!

14:01:18 - Dean:  
Midland, MI

14:01:18 - Meredith:  
Hello. Green Bay, WI

14:01:18 - Ashlie:  
Hi from Tuscaloosa, Alabama!

14:01:20 - Mardi:  
Jefferson City, MO

14:01:21 - Julee:  
Hello from Paris, IL

14:01:21 - Emily:  
Ohio



14:01:21 - Jeff:  
Norton Shores, Mi

14:01:22 - Amy:  
Elkhart Lake, WI

14:01:22 - Ali:  
Fond du Lac, WI

14:01:23 - Kathleen:  
South Hadley, MA

14:01:23 - Stacy:  
Hello From Brillion, WI

14:01:23 - Judy:  
Hello from Wilmington, DE

14:01:28 - Andrew:  
West Allis, WI

14:01:28 - Dawn:  
Grand Rapids, MI

14:01:33 - Sharon:  
Tennessee

14:01:34 - Natalie:  
Columbia, SC

14:01:35 - Miranda:  
Alabama

14:01:49 - Kayla:  
Hi from New Jersey!

14:01:53 - Jenna:  
Colorado!

14:02:02 - Audrey:  
Ohio

14:02:04 - Janelle:  
Hi everyone! Greetings from Madison, WI

14:03:00 - TaNiqua:  
Hello from Lawrence, KS



14:03:03 - Casey:

Hi from Marin County, CA 😊

14:03:11 - Robert:

Milwaukee! Hi Everyone

14:03:30 - Tracey:

Hi Everyone from NJ!

14:03:41 - Joe:

Hi Everyone from Madison, WI!

14:04:13 - Melanie:

Hello from Madison, WI.

14:15:02 - Melanie:

We offer internal financial education sessions and 1-1 coaching. We have a survey at the end of each session asking for feedback from staff on how we can enhance the offerings.

14:16:49 - Lori Thomas (WELCOA):

Email Todd at [todd.barden@morganstanley.com](mailto:todd.barden@morganstanley.com)

14:20:15 - Lori Thomas (WELCOA):

Knowledge plus action equals power!

14:20:50 - Katiya:

Yes, I 100% agree!

14:26:59 - Stacy:

I would love a webinar specifically geared around communication strategies.

14:27:32 - Amy:

2nd that @stacy

14:30:05 - Lori Thomas (WELCOA):

Check out How to Improve Communication, Focus Strength & Build Trust in Your Organization in the WELCOA Institute: <https://institute.welcoa.org/courses/leading-way-healthier-organization/>

Also available on the WELCOA Institute, Communicating Your Wellness Strategy with Purpose and Power: <https://institute.welcoa.org/courses/practitioner-perspective/>

14:39:02 - Stacy:

Thank you!

14:47:55 - Lori Thomas (WELCOA):

Email Todd at [todd.barden@morganstanley.com](mailto:todd.barden@morganstanley.com) to get a personalized demo or learn more about the study he referenced.



14:48:20 - Lori Thomas (WELCOA):

Learn more about Morgan Stanley here: <https://www.morganstanley.com/>

14:56:29 - WELCOA to Everyone:

Please take a few minutes to give us your feedback on today's WELCOA Pulse:

<https://www.surveymonkey.com/r/20210824-pulse-barden>

14:56:39 -Melanie:

I went to that night of the win. It was incredible!

14:56:49 - Robert:

Totally agree! Bucks in Six!

14:56:53 - Tammy:

Yeah Milwaukee!

14:56:59 - Joe:

Agree!

14:57:23 - Megan:

GO Bucks - we could hear the winning fireworks from our bedroom window! :)