

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:

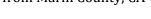
Hi everyone! Greetings from Madison, WI

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

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 <u>todd.barden@morganstanley.com</u> 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!:)