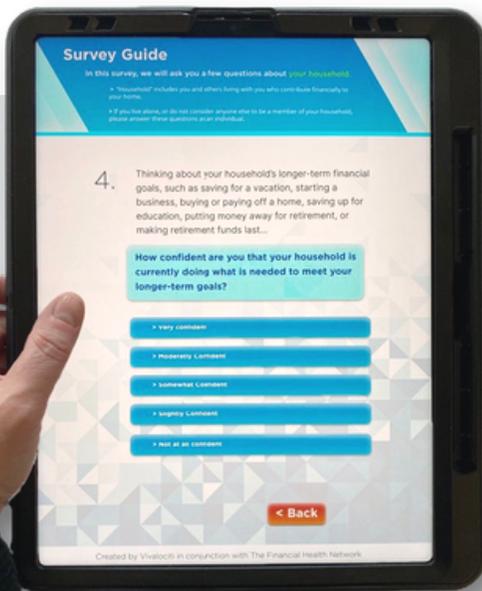


SURVEY YOUR CUSTOMERS IN-BRANCH

# FINANCIAL HEALTH CHECK

The Financial Health Check is an easy-to-use tool that provides you with a snapshot of the financial health of your customers.

The touchscreen health check is based on eight questions that align with indicators of financial health. Use insights from this analysis to understand where your customers and employees are thriving, where they are struggling, and how you can make a difference in their financial lives.



Financial health indicators measure areas of customer household spend, saving, borrowing, and planning, leveraging our expertly provided questions that explore:

- ✓ Spend versus income ratio
- ✓ Level of liquid savings
- ✓ Household debt level
- ✓ Long term goals and planning
- ✓ Insurance policy confidence

Compare the score of each person with our national standardized scores. Use the insights to understand where your customers are thriving and struggling, and how you can make a difference in their financial wellbeing.

**CONTACT US TODAY**

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