

# A MAIN STREET COMPANY FOR MAIN STREET NORTH AMERICA

Primerica helps families get the protection they need at a price they can afford, invest for the future and reduce debt.

## ABOUT US

- Largest independent financial services marketing organization in North America
- 40+ year proven track record
- Approximately 2.7 million client investment accounts\*
- Over 5.7 million lives insured through our life companies, with an average of \$6.1 million in benefit claims paid every day.\*
- Listed on the NYSE under the symbol "PRI"

\*Numbers reflect the combined totals or daily average, as indicated above, as of, or for the year ended, December 31, 2021, for the following affiliated companies: Life Insurance: National Benefit Life Insurance Company (Home Office: Long Island City, NY) in New York; Primerica Life Insurance Company (Executive Offices: Duluth, GA) in all other U.S. jurisdictions; Primerica Life Insurance Company of Canada (Head Office: Mississauga, ON) in Canada. Investments: In the United States, securities are offered by PFS Investments Inc., 1 Primerica Parkway, Duluth, Georgia 30099-0001; In Canada, mutual funds are offered by PFS Investments Canada Ltd., mutual fund dealer, and segregated funds are offered by Primerica Life Insurance Company of Canada, Head Office: Mississauga, ON. Each company is responsible for its own financial obligations.

## READY TO GET STARTED?

Working with your Primerica representative, hosting a Financial Wellness Workshop for your employees is as easy as 1, 2, 3!

1. **Pick a workshop topic:** HOW MONEY WORKS™ concepts, Debt Solutions, Saving for Retirement, Life Insurance ... and more!
2. **Choose the time and the place.** We come to you!
3. **Get the word out.** We offer a variety of materials to help you promote the workshop.

**That's it! It's that easy!** Contact your Primerica representative to get started today!



[www.primericaworkshops.com](http://www.primericaworkshops.com)

Primerica representatives market term life insurance underwritten by National Benefit Life Insurance Company, Home Office: Long Island City, NY in New York State; Primerica Life Insurance Company, Executive Offices: Duluth, GA in all other U.S. jurisdictions; and Primerica Life Insurance Company of Canada, Home Office: Suite 400, 6985 Financial Drive, Mississauga, Ontario, Canada L5N 0G3, Phone: 1-800-387-7876.

In the United States, securities are offered by PFS Investments Inc., 1 Primerica Parkway, Duluth, Georgia 30099-0001. Primerica and PFS Investments Inc. are affiliated companies. In Canada, mutual funds are offered by PFS Investments Canada Ltd., mutual fund dealer, Head Office: Mississauga, Ontario.

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COULD YOUR COMPANY BENEFIT FROM A COMPLIMENTARY

# FINANCIAL WELLNESS WORKSHOP?



## DID YOU KNOW?

Financial worries are a stressor for millions of North Americans. Ninety percent of Americans say that money impacts their stress level while Canadians report that money is their top source of stress and that they feel less hopeful about their financial futures.<sup>1,2</sup> The facts are that workers distracted by financial worries cost employers billions of dollars a year in missed work hours and other lost productivity.<sup>3,4</sup>

### A FINANCIAL WELLNESS WORKSHOP:

- **Enhances employer/employee relationships**
- **Helps with employee retention and loyalty**
- **Develops a bridge between management and employees**

## WHAT WE OFFER

Primerica believes in financial education for everyone. We believe that there are no “secrets” to financial security and that financial education isn’t just for the wealthy. Primerica’s goal is to educate hard-working, Main Street families - just like your employees - on simple concepts that can change their financial future forever.

### OUR FINANCIAL WELLNESS WORKSHOPS HAVE THREE COMPONENTS:

- 1 We can provide financial education workshops on a variety of topics.**
- 2 We offer each employee the opportunity to have a complimentary, customized financial game plan (Financial Needs Analysis) created either on-site, or in the comfort of their own home.**
- 3 We can assign each employee their own financial representative to answer any questions he or she might have.<sup>5</sup>**

<sup>1</sup> CNBC.com, “Ninety Percent of Americans Say Money Impacts Their Stress Level, According to New ‘Thriving Wallet’ Study by Thrive Global,” June 29, 2022 <sup>2</sup> Newswire.ca, “Money Is Still the Top Source of Stress for Canadians - and Many Feel Less Hopeful About Their Financial Futures,” June 7, 2022 <sup>3</sup> Resources.WellnessWorks.ca, “Is Financial Stress Stressing Your Bottom Line?” January 14, 2021 <sup>4</sup> BenefitsPro.com, “Financial Stress Costs U.S. Companies \$4.7 Billion Per Week,” August 18, 2021 <sup>5</sup> Primerica representatives are independent contractors, and are not employees of Primerica companies, or its parent company Primerica, Inc. Representatives are not financial planners or tax advisors. Any related questions should be directed to an appropriately licensed professional.

# HOW OUR WORKSHOPS BENEFIT YOUR COMPANY

Our workshops leverage Primerica’s expertise in creating a free, in-house education program for your employees.

Our structured platform supports your existing benefits programs, and does not compete with them.

Typically, financial wellness programs and workshops are a top-tier benefit that previously were only offered by some Fortune 500 companies to their employees. We’ve made this benefit accessible to small- and mid-sized companies.

Our workshops can work to reduce or alleviate many of the financial questions employees bring to the human resources department by providing a forum for employees to ask questions.

**BEST OF ALL,  
THIS WORKSHOP IS  
FREE TO BOTH YOU  
AND YOUR EMPLOYEES!**

## WHAT THEY’RE SAYING

“The financial wellness workshops put on by Primerica for our employees were a big success. We received a great deal of positive feedback about the usefulness of the information presented and the employees were grateful for the learning experience.”

**Robert J. Calnon, CPA**  
CFO, Practice Resources, LLC

“The workshops were conducted by highly trained and professional educators. I was able to obtain the necessary knowledge to become financially independent through careful planning and money management. I would highly recommend a Primerica Workshop.”

**The Honorable Walter Lojn**  
Town Justice

“The Primerica Workshop was conveyed in an easy-to-understand format. Our participants were educated on how to improve their finances during this harsh economic climate we endure. If your goal is to provide a complimentary educational workshop for the members of your organization, I highly recommend a Primerica Workshop.”

**LaVonne Erskine, Ph.D.**  
Program Director, Economic Opportunity Commission

“The financial workshop presented by Primerica had much farther reaching effects than I had anticipated. The feedback that I received from co-workers is that it helped to bring real clarity to both the short- and long-term financial pictures, which can often be confusing and intimidating.”

**Mark Koester**  
President & CEO, Koester Associates, Inc.