



Financial Fitness Mentor program for bank/credit union customers featuring



Assistance for customers stressed about money, struggling with debt, having difficulty caring for their family or just looking for a better, easy, natural way to budget their household income

Features

Bank/credit union:

- Appoints employees to be Financial Fitness Mentors
- Reimburses Financial Fitness Mentors for Income Companion licenses

Financial Fitness Mentor:

- Uses Income Companion at home
- Mentors customers on using Income Companion
- Conducts financial fitness seminars at schools and businesses

Benefits

Bank/credit union:

- Each customer who uses Income Companion will:
 - Maintain a high checking account balance as a byproduct of using the software
 - Have no overdrafts
 - Have extra money for saving and investments
- The program is a marketable service that will attract new business and help build loyalty
- Seminars at schools and businesses will promote awareness of financial fitness options and related company products

Customers using Income Companion will:

- Be financially fit by budgeting their household income correctly
- Have an informed view of their everyday money
- Appreciate their bank/credit union as a resource for assistance with managing their income