



**FREEDOM TRAIL**  
FINANCIAL

## Workplace Financial Wellness Programs for the Life Science Professional

Explosive growth and innovation within the life sciences sector has encouraged exciting changes for organizations both big and small and spurred frequent career moves for professionals seeking opportunities that accommodate their skill sets and research. Investing in your employees is essential to retaining your best talent, recruiting good employees and creating a productive workforce. Your employees are the face of the company, delivering your vision, mission and brand. The benefits and incentives you offer are a key advantage in attracting and retaining these quality employees, and helping them envision a successful future with your organization. As a result of our extensive involvement in the life sciences sector, Freedom Trail Financial has an in-depth knowledge of the changing financial landscape and is uniquely positioned to offer financial wellness programs to life science companies.

As part of our workplace financial wellness program, we offer various services that can be tailored to highlight your organizations' benefits package and most importantly provide education to your employees so they can maximize the numerous benefits programs your company offers.

### Financial Planning

We offer personal financial advice to help employees achieve their financial goals.

Adding financial planning to your benefits helps:

- Provide personal support for employees
- Provide broad or specific planning services that address your business objectives
- Offer benefits to all employees or to select groups

### Financial Education

We offer group education programs covering key financial topics to help employees with financial planning and benefit decisions.

We can:

- Provide seminars, events and complimentary initial consultation
- Suggest topics relevant to your employee needs and culture
- Offer practical, actionable financial conversations

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*Financial Advisor & Principal*

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We provide personalized financial planning and investment management for our clients with an emphasis on those in the life science industry. Our mission is to empower clients with the guidance and counsel they need to achieve their financial aspirations while living in accordance with their personal values.