

Financial Wellbeing Offerings

At Allegacy Federal Credit Union, we are committed to promoting the financial health of our members, employees, and the broader community. Our overarching goal is to equip and empower our individuals to make the behavioral change that leads to financial wellbeing. We believe in moving ideas into action using resources and tools that break down ambitious goals into actionable steps.

- **Financial Wellness Workshops** – We are uniquely qualified to present on a range of personal finance topics, including those listed here. This is not an exhaustive list, as no two sessions are alike and we routinely customize our content to meet the needs of the audience. Sessions can be delivered virtually, in person, or via on-demand video. Additionally, we can deliver age-appropriate training to students from K-12 through university.
 - Building Emergency Savings
 - Budgeting to Beat Inflation
 - Credit Score 101
 - Ways to Pay for College
 - Maximizing Employee Benefits
 - Protecting Your Identity
 - Avoiding Spending Traps
 - Financial Wellbeing in Uncertain Times
 - Strategies for Managing Debt
 - Surviving the Holiday Shopping Season
- **Digital Financial Wellness Resources** – Allegacy offers a full range of digital learning resources to help individuals better understand personal financial topics and more effectively manage their money.
 - [Learning Resources](#) include financial calculators, budgeting and security tips, financial challenges, and activities for kids. Access our Events calendar and make an appointment with a financial coach.
 - [Enrich](#) is Allegacy’s digital financial education portal that offers customized content and practical tools based on your financial wellness checkup. Engage in Money Mindfulness and enter the Monthly \$1000 Challenge for a chance to earn a cash prize while you learn.
 - [Money Management](#) is a free online personal finance tool available to Allegacy members within WebBanking and the mobile app that provides powerful insights into your complete financial situation.
 - [Smart Blog](#) provides sound advice on a range of financial wellness topics that are short, insightful, and easy to apply to your own life.
- **1:1 Financial Coaching** – This service is offered at no cost to Allegacy members who are looking for an accountability partner as they identify and then work toward achieving their unique financial goals. These one-hour confidential coaching sessions are delivered virtually by a certified financial counselor every four to six weeks.

For more information, contact:

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ALLEGACY FEDERAL CREDIT UNION

