



Financial Fitness Mentor

For banks and credit unions

An inexpensive, non-intrusive customer benefit offered by banks and credit unions to customers who are stressed about money, struggling with debt, having difficulty caring for their family or just looking for a better, natural way to manage their household finances.

Features

Bank/credit union

- Appoints one or more employees to be a Financial Fitness Mentor
- Reimburses Financial Fitness Mentors for their personal use of You Need A Cash Plan
- Offers a checking account designed to take advantage of You Need A Cash Plan's features

Financial Fitness Mentor

- Uses You Need A Cash Plan at home to manage household finances
- Mentors customers on getting started with and using You Need A Cash Plan
- Conducts financial fitness seminars at schools, businesses, and community workshops

Benefits

Bank/credit union

- Each customer who uses You Need A Cash Plan will tend to have:
 - Few, if any overdrafts
 - Extra money available for savings and investments
- The mentor program is a marketable service that will attract new business and build loyalty
- Seminars will promote awareness of financial fitness options and products

Customers using You Need A Cash Plan will:

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