Fireside Finances
Master your money

Give your employees the financial education they deserve.

We teach your employees how to better manage their money and maximize their benefits.

Robert J. Shaye, CFP®
Founder, Fireside Finances

84%

of employees want more financial education

98%

of attendees would highly recommend this training to colleagues

We provide interactive and engaging training

Fireside Finances comes to your place of work and hosts educational workshops for your employees. Topics we cover include:

- 401(k) benefits
- FSA/HSA plans
- Investment selection
- Employee stock plans
- Investment fees
- Credit scores
- Tax considerations
- RSUs/Option grants
- And more...

How does it help my employees?

84% of employees are asking for more financial education from their employers. Participants who have completed the training said it was “absolutely worth their time” and reported a far greater comprehension of topics in the exit survey. Your employees will feel financially empowered, reducing their overall stress. Additionally, it encourages your employees to save more for retirement.

How does it help my company?

For one, a reduction in employee stress leads to greater productivity on the job. Financial education/wellness is also an excellent retention and recruiting tool. It drives greater participation in your 401(k) plan which can help pass defined contribution discrimination rules. Lastly, 401(k) matching funds may be a tax-break for your company!

Doesn’t my 401(k) provider provide this same training?

Not quite. We’ve found 401(k) providers cover some of these topics, but training is not very well-attended, informative, or engaging. Their training is usually limited in scope and does not cover more in-depth topics. Also, as a CFP®, Rob is able to help your employees select investments in their retirement accounts, something 401(k) providers and HR staff typically cannot do.

Are you going to try to recruit clients and sell services?

Not at all! Our only product is education. Rob is a Certified Financial Planner professional and we’ve purposely structured the business so that we do not manage client money. You literally cannot “sign up” with us. This allows us to act as a fiduciary and provide truly unbiased advice.

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Office cred

- CFP® professional
- MBA from UC Berkeley
- Worked for BlackRock for 3+ years (world’s largest asset manager with over $6 trillion under management)
- 14+ years as a military officer

Street cred

- Had an IRA since age 15
- Maxed out retirement accounts since age 23
- Has delivered training to over 1,000 employees

Fireside Finances is a veteran-owned small business and a proud supporter of our men and women in the military.

CFP FPA Financial Planning Association BUNKER LABS

Want more information or ready to book your first session?

To learn more about how we can help your organization, please get in touch.

rob@firesidefinances.com 916.538.5351 firesidefinances.com