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FOR IMMEDIATE RELEASE

Press Release

Milliman launches enhanced Healthy Financial Outcomes financial wellness experience for retirement plans

Interactive website, live webinars, videos, targeted savings reminders, personalized nudges drive financial literacy

SEATTLE – JUNE 18, 2024 – Milliman, Inc., one of the premier global consulting, actuarial, and benefits administration firms, announced today that it has launched an enhanced financial wellness experience for participants in Milliman-administered retirement plans.

“Healthy Financial Outcomes is a personalized experience designed to elevate financial literacy, instill confidence in daily financial decisions, and guide employees toward a healthier financial future,” said Julie Bentz, Milliman principal and communication director. “It makes taking action simple by linking directly to our user-friendly participant website. Here, participants can make transactions and access real-time information about their plans, investments, and accounts.”

The foundation of the Healthy Financial Outcomes experience is an interactive platform that addresses the emotional and practical sides of managing money, enabling participants to feel more confident as they manage their retirement planning. It boasts intuitive navigation and curated guides, allowing participants to explore topics based on their interests, financial priorities, or life stages. With a wide array of resources, including articles, videos, and events, participants have ample opportunities for exploration. Healthy Financial Outcomes experience is supported by a comprehensive curriculum that includes targeted savings reminder emails, personalized website prompts, live webinars, and more.

“As the definition of financial wellness evolves and employee frustration over finances continues to rise, we are excited to provide a resource for our clients to help improve their employees’ financial literacy,” said Kari Jakobe, Milliman principal and defined contribution practice leader. “Our approach meets employees where they are, breaking down barriers and guiding them on how to manage their money effectively. Improving participants’ mental well-being and financial security not only benefits employees, but it also boosts business performance by improving employee satisfaction and productivity.”

About Milliman

Milliman is a leading provider of consulting services, benefit administration and employee communication. The firm has practices in healthcare, property and casualty insurance, life insurance and financial services, and employee benefits. Founded in 1947, Milliman is an independent firm with offices in major cities around the globe. For further information, visit milliman.com.

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