
UBS ups its financial wellness game

By Editorial Staff *Thu, Nov 22, 2018*

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UBS Equity Plan Advisory Services (EPAS) has released a financial wellness digital content offering to participants in the retirement plans it serves. The move follows an announcement earlier this year of “a re-imagined and education-focused digital user experience” for more than 800,000 plan participants.

The new content experience delivers videos, infographics, articles and “gamified” content to teach employees about planning, budgeting, saving, managing debt, investing, and retirement.

The offering is based on research on participants’ needs and wants, gathered from UBS’s corporate clients. This included researching HR related topics, such as employee retention, motivation and length of service.

EPAS will collaborate with Napkin Finance, Aon Equity Services and Imprint, to educate participants about equity compensation and their money, said Michael Barry, head of UBS Equity Plan Advisory Services at UBS Financial Services Inc., in a release.

The debut of the digital content is part of a broader financial wellness rollout to UBS’s more than 10,000 corporate clients, clients and prospective clients. The full offering will provide financial assistance from licensed UBS Financial Advisors, including a wellness assessment, seminars and webinars.

Other UBS partners include SigFig, to develop a digital advice platform; Solium, to deliver a platform for Global Equity Plan Administration; BlackRock, to offer Aladdin Risk for Wealth Management for UBS Financial Advisors; and Broadridge, to create a wealth management industry platform.

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