

# COVID Relief Planning Assistant



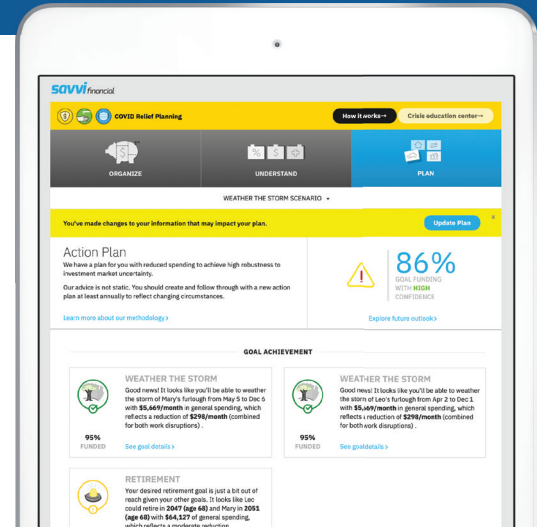
Offer compassionate, valuable assistance by providing personalized financial guidance to employees that have been laid off, furloughed, or are working reduced hours.

## THE PROBLEM:

The rapid spread of COVID-19 has resulted in a volatile and unpredictable environment for businesses. Many employers have implemented a combination of layoffs, furloughs, or reduction of hours for their workforce. This is an extremely emotionally and financially challenging time for impacted employees. **SAVVI** developed the COVID Relief Planning Assistant to help employees in need create a short-term financial plan.

## OUR SOLUTION:

**SAVVI** provides actionable financial guidance, personalized for each household impacted by lost or reduced income. The recommended actions take into account unique CARES Act benefits, as well as tax consequences, and long-term retirement plan goals.



Sample Action Plan

## The SAVVI action plan helps to inform:

- ❖ Estimated household budget and expenses
- ❖ Recommended spending cuts
- ❖ Specific funds to address income shortfall
- ❖ Debt sources for short-term expenses
- ❖ Savings for longer-term retirement goals

## HOW IT WORKS:



**Web-based landing page** with potential co-branding and tailored company messaging



**Turnkey onboarding** for quick activation to targeted employee populations



**Detailed tracking and metrics** to understand overall platform usage



Access to a **robust educational resource library**



Sample Weather the Storm Goal

## WHY YOU NEED THIS:

How employers respond to the COVID-19 pandemic will have a significant impact on future employee retention and recruiting efforts. Offering this unique experience to affected employees provides help at a critical time – and it can be implemented within days.

Contact us at **781-583-7011** or [sales@savvifi.com](mailto:sales@savvifi.com) to discuss how this innovative solution might work for you.

### About SAVVI

Started by a team of MIT PhDs with 20+ years experience in finance, analytics and robust optimization with a core mission to democratize financial planning and advice. SAVVI Financial LLC is an SEC-registered investment advisor that delivers tax-smart financial guidance using deep quantitative analysis to help customers achieve their financial objectives.

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