

Financial Wellness Benefits

questis[^]

Just For You!

Follow these quick steps to get started:



1 Complete the Assessment (3 mins)

Go to go.myquestis.com or scan the QR code to get started. Either of these actions will lead you to your financial wellness dashboard where you will be prompted to take a quick assessment. Next, you will receive your Financial Empowerment Score which determines the personalized next steps that will help you achieve financial success.



2 Link Your Accounts (2 mins)

Get organized, track your finances, and maximize your Questis experience by linking your financial accounts. Start by setting up your primary spending account or credit card. Head over to the 'My Money' section, type your bank's name into the search bar, enter your password, and click Connect!

Account Type	Account Name	Balance
Checking	Checking	\$5,481.79
Savings	Savings	\$24,588.96
Investment	Investment	\$603,279.92
Credit Card	Credit Card	-\$4,217.02
Loan	Loan	-\$61,667.51
Checking	Checking	\$5,187.24
Checking	Checking	\$104.33
Epic Bank Checking	Epic Bank Checking	\$2,187.24
Payroll	Payroll	\$187.34
Premium Checking	Premium Checking	\$85.64
Savings	Savings	\$24,588.96
Chase Savings	Chase Savings	\$2,714.26
Epic Bank Savings	Epic Bank Savings	\$21,874.70



3 Take Action (3 mins)

Based on the information you provided, we can now guide you through a few easy wins to get you on the right financial track ASAP! Click 'Money Moves' at the top of the page, and choose one to get started. Take action and don't forget to mark your Money Moves as complete when you're finished!

questis HOME MY MONEY MONEY MOVES LIFETIME INCOME RESOURCES

4 pts **Active**
Automate some percentage of each paycheck towards retirement.
View details

4 pts **Active**
Maximize your recovery.
View details

4 pts **Active**
Track your college savings.
View details

4 pts **Active**
Consider your options regarding your mortgage.
View details

4 pts **Active**
Review your banking relationship.
View details

4 pts **Complete**
Create a goal to eliminate your credit card debt.
View details

Congratulations!

In less than 10 minutes you've taken steps to set yourself up for future financial success! Now, remember to log back in often to check on your progress, learn and continue to make progress!

Log in at go.myquestis.com

