



Case Study – Meet Emma

I met Emma a couple of months into the pandemic. She just began tele-working with her clients and adjusting to the new normal of working from home. Emma was very concerned about her finances; specifically in regards to her retirement savings and would benefit from supportive direction.

When Emma met with me for the first time she felt like she was unprepared to handle the uncertainty of the pandemic. She was also confused about where to put her hard-earned money. She had debt she was trying to eliminate, while simultaneously trying to save, and was struggling with how to prioritize her money.

Emma downloaded the Empower Financial Guide and scheduled a consultation with me to review her concerns. Using the guide, I walked Emma through each step which provided education and increased her financial awareness. This encounter also identified key areas for her to improve her savings and get a better handle on her debt.

After a recent check-in with Emma she feels much more confident and relaxed about her finances. She has been able to reduce her debt significantly since we first met and after making a few changes to her savings strategy has established an emergency fund and is on track toward a happy and healthy retirement!

