PlanSmart®
FINANCIAL WELLNESS

Frequently Asked Questions

Q: What is PlanSmart® Financial Wellness?

A: PlanSmart Financial Wellness is a new benefit provided by your employer that makes it easy to start, easy to plan and easier to achieve your financial goals. You'll get exclusive access to top financial experts, any time you want, any way you want — in person, by phone, or online — and with confidentiality, at no cost to you. We'll work with you to make a personalized plan so we can make progress towards achieving your financial goals together.

Q: How can I access PlanSmart Financial Wellness?

A: Use your computer, smartphone, or tablet to access the PlanSmart Financial Wellness website 24/7. Plus, contact your personal planner online or over the phone between the hours of 9:00 a.m. to 8:00 p.m. Eastern Time, Monday through Friday. You can also and attend in person workshops for educational learning.

Q: What can the website help me do?

A: Message your own personal financial planner to ask questions or schedule phone calls. And link your online accounts to see your finances with a full, 360-degree view. Plus, access interactive tools that help you do things like figure out how much income you need to retire or set a plan to reduce your debt.

Q: How do I work with a financial expert?

A: You can access EY financial planners by phone when it's convenient for you. Plus, take advantage of local workshops hosted by highly qualified financial professionals from MassMutual held wherever you work and tailored to your company's benefits.

Q: So, exactly who has access to my personal information?

A: Rest assured, your personal financial information stays secure and is held confidential and is used so your planner can provide you better, more personalized coaching. Personal information is not shared with your employer.

Q: What experience does my financial planner have?

A: Work with your very own professional, credentialed EY financial planner who's fully trained on your company's benefits and there to provide confidential, objective guidance. Feel free to message your planner as often as you'd like through the website, or schedule phone consultations

Q: What information does my planner have access to?

A: As much as you want. For more effective conversations you may choose to share more information knowing it remains secure and confidential.

Q: Will I know who my planner is before I speak with them?

A: Yes, you will receive a bio and picture beforehand to allow you to better understand their background and qualifications.

Q: What will PlanSmart Financial Wellness cost me?

A: Absolutely nothing. The program is fully paid for by your employer at no cost to you.

Q: What about my partner? Will they have access too?

A: Even though your partner will not be able to create their own account, you're more than welcome to share access with them yourself. Plus, feel free to sync their accounts with the online platform in order to have a true, 360-degree view of your household's finances. Not to mention, with your authorization, your partner can speak one-on-one with a planner themself.

Sign up online at https://NEBA.myplansmart.com or on the phone at (844)522-2063.

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