



Perks Survey Solution Suggestion Key

Based on responses from your participants, below are ideas for benefits you might consider.

WHAT IS YOUR NEXT MAJOR LIFE TRANSITION?

Assess if your population has concentrated pockets going through similar life transitions and offer benefits/activities/support for these transitions.



Buying a Home/Moving

SUGGESTED BENEFIT

- Group homeowner's insurance voluntary benefit
- Credit counseling service
- Home buying assistance
- Housing allowance
- Workshop on how to buy a house
- Workshop on financial impact of buying a house



Remodeling a Home

SUGGESTED BENEFIT

- Workshop comparing home equity line of credit and renovation loan
- Workshop on how to be your own general contractor or how to hire a contractor
- Credit counseling service



Retirement

SUGGESTED BENEFIT

- On-site seminars
- Supply *Ready or Not: Your Retirement Planning Guide* to employees. **(US ONLY)**
- Retirement visualization tools
- One-on-one meetings with financial advisor
- Phased retirement program



Childbirth/Adoption

SUGGESTED BENEFIT

- Baby bonus
- Adoption financial assistance
- Adoption leave/parental leave
- Foster care financial assistance or leave
- Gradual ramp-up to full-time schedule after leave
- Parent coaching services
- EAP referral to adoption networks
- Will preparation (EAP)
- Financial counseling



Sending Children to College

SUGGESTED BENEFIT

- Workshop on what it means to cosign a child's student loan or take out parental loans
- Scholarships for children
- Workshop on student loan repayment strategies and mistakes to avoid
- Workshop on how to transition to becoming an empty nester



Marriage

SUGGESTED BENEFIT

- Wedding leave
- Travel planning services
- Will preparation (EAP)
- List of accounts requiring change to beneficiary designation
- List of places/people you need to notify
- Information on tax implications



Divorce

SUGGESTED BENEFIT

- Legal services referral (EAP)
- Group legal plan voluntary benefit
- Provide model qualified domestic relations order (QDRO) to assist with splitting retirement assets. **(US ONLY)**
- List of accounts requiring change to beneficiary designation
- Information on tax implications
- Counseling/EAP access
- List of places/people you need to notify



Pet Adoption

SUGGESTED BENEFIT

- Pet insurance
- "Pawternity" leave
- Employee resource group for dog owners
- Dog grooming workshops
- Charity drives like "Pet of the Year" contests benefiting a local shelter
- Pets at work

Perks Survey Solution Suggestion Key

WHAT ARE YOUR MAJOR PAIN POINTS?



Child Care

SUGGESTED BENEFIT

- EAP referral service or lists of nearby child care providers
- Dependent care flexible spending account (DCAP) **(US ONLY)**
- On-site or near-site daycare (subsidized or not)
- Emergency/sick child care
- Babies at work
- Reimburse membership for nanny-finder site such as care.com
- Information on how to pay taxes and payroll for a nanny
- Take your child to work day
- Autism treatment coverage



Work/Life Balance

SUGGESTED BENEFIT

- Ad hoc telecommuting
- Lunch break flexibility
- On-site nap room
- On-site quiet room
- Telemedicine
- Reduction in hours agreements
- Reimbursement for home office
- Allow leave to attend child's activities
- If on-site parking, offer fuel delivery
- Concierge for errands
- 10-minute meditation sessions in quiet room
- Flexible start and end times
- On-site or near-site fitness options



Depression/Anxiety/Other Mental Health Struggles

SUGGESTED BENEFIT

- Leaders communicate a program to reduce stigma
- Online cognitive behavioral therapy
- EAP referral
- Gratitude journal
- Resiliency program
- On-site mindfulness meditation sessions
- Reimbursement of mindfulness app
- Workshop on self-compassion skills
- Mental health benefits coverage
- Training on mental health first aid



Elder Care

SUGGESTED BENEFIT

- EAP referral
- Lunchtime talking groups where people can share experiences and resource ideas
- On-site or near-site elder care
- Emergency/sick elder leave
- Reimburse membership for caregiver-finder site such as care.com
- Geriatric care counselor referral or services
- Elder care leave
- Gradual ramp-up to full-time schedule after leave



Student Loan Debt

SUGGESTED BENEFIT

- Tuition assistance program
- Full-tuition coverage or \$1 per day tuition arrangement with online university
- Student loan repayment assistance
- Match employees' loan payments with employer contribution to defined contribution plan.
- Student loan refinancing
- Credit counseling service
- Workshop on using section 529 plan to repay student loans **(US ONLY)**



Fertility Challenges

SUGGESTED BENEFIT

- Surrogacy reimbursement
- Insurance coverage or stipend for fertility treatments, medications, genetic testing
- EAP referral for miscarriage and loss support group/counseling

Continued on next page.

WHAT ARE YOUR MAJOR PAIN POINTS? *(Continued)*



Affording Day-to-Day Expenses

SUGGESTED BENEFIT

- Payroll advances/weekly payroll deposits
- Low-interest loans
- Employer contribution to emergency savings
- Commuter subsidy, carpooling, free parking
- Mobile phone subsidy
- Discounts on company products or services
- On-site credit union or bank
- Reimburse cost of budgeting apps.
- EAP referral
- On-site cafeteria (fully subsidized)
- Rent stipend
- Casual dress code
- Free or discounted uniforms
- Employee purchase program
- Credit counseling and debt management tools
- Personal finance educational sessions
- Financial planning and budgeting services



Alcohol/Substance Abuse

(yourself or a loved one)

SUGGESTED BENEFIT

- EAP referral
- Insurance coverage for a variety of reputable treatments
- Online cognitive behavioral therapy
- On-site informational sessions
- Health care advocate to guide participants to in-network treatment



Career Planning

SUGGESTED BENEFIT

- Professional development reimbursement/subsidy
- Work time set aside to pursue career growth projects
- Mentorship program
- Paid time off to serve on the board of a professional association
- Sabbatical program
- Career coach/counseling services
- Tuition reimbursement



Funding Children's Education

SUGGESTED BENEFIT

- College savings plan payroll deductions
- College savings plan employer contribution or match
- Scholarships for children
- Workshop on federal student aid application
- Workshop on using college savings plan for apprenticeship program costs **(US ONLY)**



Retirement Planning

(See also retirement list on page 1.)

SUGGESTED BENEFIT

- Financial planning services
- Estate planning services
- Retirement income calculators
- Cash flow and debt management tools

Perks Survey Solution Suggestion Key

WHAT DO YOU DO OR WISH YOU DID MORE OF TO UNWIND?

Identify ways to tweak wellness offerings to be more inclusive or to create clubs/gatherings for like-minded employees.



Book Club/Reading

SUGGESTED BENEFIT

- Organize a lunchtime book club.
- Provide an online portal to share reviews/recommendations of books



Theater/Concerts

SUGGESTED BENEFIT

- Group ticket discount
- Organize group outings



Crafting

SUGGESTED BENEFIT

- Lunch crafting groups
- On-site art therapy



Charity/Nonprofit Volunteer

SUGGESTED BENEFIT

- Organize a volunteer day/afternoon.
- Paid time off to volunteer
- Charitable donation matches



Outdoor Activities

(hunt, fish, ski, bike, run, boat, surf, hike, climb, golf, etc.)

SUGGESTED BENEFIT

- Walking meetings encouraged
- Exercise breaks encouraged
- Modify gym reimbursement policy to include purchase of equipment for outdoor activities or state/national park access.



Gym

SUGGESTED BENEFIT

- Reimbursements or memberships to local fitness facilities
- On-site or near-site gym



Movies

SUGGESTED BENEFIT

- Group ticket discounts
- Reimburse subscription service fees



Massage

SUGGESTED BENEFIT

- On-site massage
- Stipend or reimbursement
- Massage benefit coverage



Pets

SUGGESTED BENEFIT

- On-site animal therapy
- Pets at work
- Pet poster contests benefitting local animal shelters



Learning New Skills

SUGGESTED BENEFIT

- Stipend or reimbursement for community college recreation department online classes
- Offer non-job-related classes (e.g., language, chess, knitting, computer programming)



Home/Video/Subscription-Based Workouts

SUGGESTED BENEFIT

- Reimburse app fees.
- On-site smart TV with apps



Musical Performance

SUGGESTED BENEFIT

- On-site music room
- Form a company band



Gaming/Cards

SUGGESTED BENEFIT

- Lunch game leagues
- Reimbursement for equipment



Organized Sports

SUGGESTED BENEFIT

- Sponsor employee teams
- Group outing to local sports team events/games.



Alternative Fitness/Wellness

(martial arts, yoga, barre, Pilates, dance, other facility that caters to a specific practice)

SUGGESTED BENEFIT

- Create a multipurpose space on-site by repurposing a room.
- Expand your gym reimbursement policy to include fitness/wellness alternatives.
- On-site classes



Cooking/Baking

SUGGESTED BENEFIT

- Offer classes on various types of cooking, knife skills, baking, cake decorating, etc., before or after work or during lunchtime.



Gardening

SUGGESTED BENEFIT

- On-site garden that employees are allowed to tend to during the workday