



COPPELL
INDEPENDENT SCHOOL DISTRICT
Empowering Educational Excellence

Board Action Required ☒

No Action Required ☐

To: Board of Trustees
From: Diana Sircar
Date: October 28, 2019
cc: Brad Hunt, Sid Grant

RE: Financial Wellness Program for CISD employees

Region 10 Educational Service Center offers an inter-local agreement to provide Financial Wellness services to the district and its employees. TCG Advisors, LP is the provider of the services. TCG Advisors, LP is currently the provider of the district's Region 10 457(b) plan.

FinPath, the Financial Wellness program, is a comprehensive financial wellness solution that empowers users to make prudent financial decisions and reduce financial stress. It can provide employees with financial modules, calculators and a planning toolkit plus financial workshops and advisor access.

Recommendation: The Board of Trustees approve the Resolution to add Financial Wellness Services to the district's inter-local agreement with Region 10.