



Episode 83: What Employees Really Want from Financial Wellness

In this episode of *Revamping Retirement*, hosts [Matt Patrick](#) and [Pete Ruffel](#) unpack insights from CAPTRUST's first annual [Financial Wellness Survey](#). They're joined by [Chris Whitlow](#) and [Cat Ellis](#), who break down the evolving landscape of financial stress, engagement trends, and what employees truly want from their financial wellness programs. The conversation highlights key findings around generational differences, the power of personalized one-on-one advice, and surprising gaps between what stresses employees and what they're most eager to learn. Together, the group explores how plan sponsors and advisors can turn these insights into more effective, tailored strategies that genuinely support participants' financial confidence.

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