



Board of Education

TO: Board of Education
FROM: Executive Director of Business & Operations, Karen Apostoli
DATE: July 23, 2026
RE: FinPath Financial Advisory Services

This memo is:

- ☐ Information only.
☐ Information with a recommendation, and a request for Board consent.
☒ Information with a recommendation, and a request for Board approval by vote.

Date by which a Board decision is needed: 08/06/2026

Previous memos on this topic can be found:

- ☐ in previous Board packet(s) dated. ____
☐ or attached to this memo

Basic information:
The administration is asking the Board to approve the agreement with RPW Solutions, LLC for an employee Financial Wellness Program.
Background or historical information:
As part of the district's journey to increase the quality of benefits offered to employees, we created a three-part plan: 1. Review existing 403b offerings and make recommendations to improve them. - Completed 10/2/2025 2. Continue monitoring investment selections in accordance with the Advisory Agreement with Hub International. - Approved 11/20/2025 and ongoing. 3. Provide Financial Wellness opportunities for staff FinPath (\$10/employee - \$3,000 minimum) is a financial wellness program designed to support employees at every stage of their financial journey. It is built on what FinPath refers to as 4 pillars: • Group Workshops - delivered by licensed Financial Advisors and certified Personal Finance Coaches ○ Mastering your spending plan, building healthy habits, setting financial goals, legacy planning, and topics relevant at every stage. • Unlimited 1:1 Financial Coaching - Confidential -licensed Financial Advisors and certified Personal Finance Coaches ○ Paying down debt, improving credit, managing your budget, saving for emergencies, retirement & investing, student loans, major life events, etc. • Digital Platform - An online dashboard and mobile app (24/7) providing financial tools, educational courses, and a Digital Money Assistant. ○ Paycheck analyzer, benefits guidance, FinPath University, etc. • Communication Support - Program promotional support and assistance.
Previous decisions, actions or parameters that relate to this topic or issue: (Options) 3 options

Recommendations: (Recommendations) and (Evaluate)
The administration recommends approval of the FinPath agreement for \$3,000.
Other questions? What else does the Board wish to know?: