

Corporate events demand significant time and attention from leaders, HR teams and your workforce.



Our experience with corporate events includes:

- Mergers & acquisitions
- Pension changes & freezes
- Voluntary & involuntary separations
- Divestitures & spin-offs

Impact to employees

We can guide employees through complex considerations, taking a holistic view across financial topics, including:

- Cash flow and goal analysis
- Tax planning strategies
- Relocation benefits concerns (i.e. multi-state tax)
- Equity compensation
- Personal application of benefit transitions
- Estate planning
- Investment planning and education
- Healthcare options
- Life and disability insurance transition
- Retirement income and wealth accumulation strategies

Goldman Sachs can partner with your organization to help navigate important financial and benefit decisions, while serving as your employees' go-to resource.

Our solution



Personalized financial guidance

Provide employees the support they need through group education combined with digital tools and access to advisors based on financial complexity and exposure



Resource for HR team

A dedicated team available to address your employees' questions, ease administration and implement a turn-key solution



Technical specialists

Experienced specialists and the resources of our global firm provide unique insights to manage challenges that arise before, during and following an event

Value to your HR team

- Direct outlet for employee questions, removing the burden from your team
- Help employees make sound financial decisions inline with corporate goals and regulatory requirements
- Ease administrative issues
- Provide employee feedback on utilization, sentiment and outcomes related to program goals
- Offer insights on benefits trends from your peers
- Keep executives and employees focused on your business
- Harmonize messaging across benefits providers
- Help retain key talent by enhancing appreciation of compensation and benefit plans
- Generate goodwill by providing employees with resources and support upon separation
- Compliment additional outplacement services and coordinate for employees across providers



Support your entire workforce with programs designed to address the unique components of your corporate event



The customized solutions implemented by our experienced team have helped employees manage planning and wealth management considerations before, during and after various events—leveraging the full resources of Goldman Sachs.

Examples:

M&A

Event details

As part of an acquisition, the shares of over 100 employee equity holders were canceled in return for a lump-sum distribution, with no opportunity to defer income—raising significant tax, cash-flow and investment concerns.

Our solution

Through group education and digital tools, we helped affected employees understand the implications of the event and immediate planning considerations.

Our advisors followed up with individual support to help implement personalized solutions.

Benefit changes

Several retirement benefit changes were set to go into effect with varied impacts on 30,000 employees. The changes needed to be communicated broadly, with special consideration to help each employee understand the impact to their personal situation. A subset required sophisticated support on their retirement decision.

We designed a unique program to segment and target individuals based on how they were personally impacted. Each segment received customized group education to build a common level of understanding. For employees requiring decision-support, advisors conducted direct outreach to help them understand their options and could make a decision that best fit their personal situation.

Early Retirement

Faced with the need to reduce headcount, a company prepared a voluntary retirement offer to over 4,500 employees in a consolidated timeframe. For many employees, the decision to retire carried significant planning considerations.

Starting with group education, we implemented a program to help each employee understand if the decision to retire was right for them. Proactively, early in the decision window, advisors reached out directly to the affected employees to deliver personalized guidance and a financial plan. Post-separation support was also made available to guide employees through the transition.

Over 65% of eligible employees met with an advisor and 70% accepted the voluntary retirement offer, exceeding the company's expectations.

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