

Addition



CASE STUDY

How ADT Uses Addition Wealth to Support a Diverse, Nationwide Workforce

**ABOUT ADT**

A global leader in intelligent security, automation, and safety innovation

EMPLOYEES

13,000+

HEADQUARTERS

Boca Raton, FL

ADDITION WEALTH OFFERING

- Financial wellness platform
- Virtual webinars and events
- Unlimited one-on-one access to financial professionals

OVERVIEW

ADT, a provider of smart home and small business security solutions, partners with Addition Wealth to deliver practical, high-impact financial wellness for its 13,000+ employee population spanning technicians, call center teams, and corporate staff.

When ADT sought to enhance its employees' financial wellness, the company learned about Addition Wealth through its benefits broker and decided to roll out the program to its workforce. The program is a flexible and accessible benefit for employees and has become embedded into various programs and initiatives including Employee Resource Groups, weekly technician huddles, and benefits fairs, while relieving the Benefits team of ad-hoc financial questions.

ADT is a leading provider of smart home and small business security solutions, trusted by millions of customers across the United States.

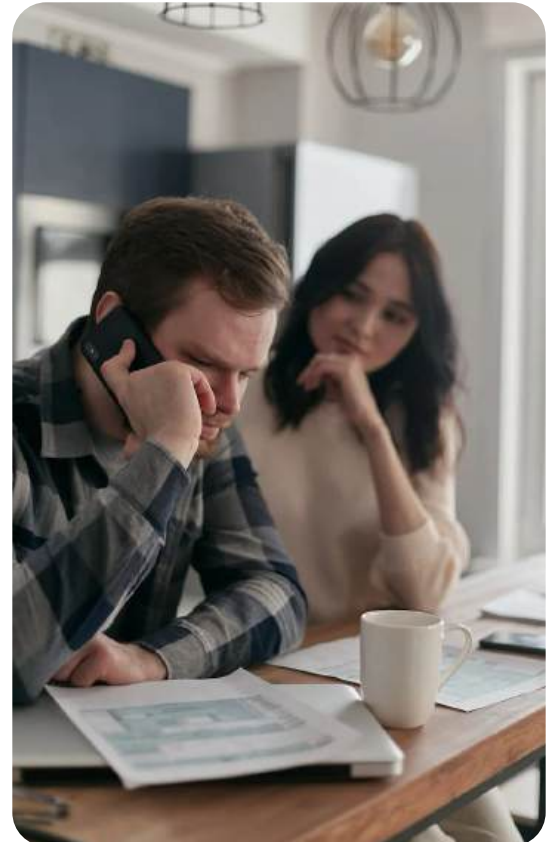
With more than 150 years of experience, ADT delivers peace of mind through advanced security systems, professional monitoring, and cutting-edge technology that keeps people and property safe. Beyond traditional security, ADT continues to innovate with integrated smart home, automation, and safety offerings designed to protect what matters most.

**ADT'S BENEFITS PHILOSOPHY: BALANCING COST, COMPETITIVENESS & EMPLOYEE NEEDS**

ADT offers a comprehensive and competitive benefits package designed to support employees' overall well-being. From medical, dental, and vision coverage to supplemental programs like accident insurance, critical illness, and disability protection, ADT covers foundational health needs for employees.

For financial support, the company also invests in its employees' future and financial peace of mind, contributing to 401(k) plans with a generous company match and offering tools for estate planning, debt counseling, and tax support. ADT also offers family support through paid parental leave programs, adoption assistance, and childcare resources, as well as physical wellness and mental health programs, and perks like identity protection, pet insurance, and legal assistance. The company is committed not just to protecting employees' work life, but the employees' and families' whole lives.

ADT's benefit strategy is anything but reactive. Every year, ADT kicks off its benefits strategy planning by looking at everything from healthcare costs to employee feedback to competitive benchmarking. The benefits team doesn't just look at numbers, but they listen. Regular conversations with Talent Acquisition provide insight into what prospective employees are asking for, while internal surveys and program utilization data offer a pulse on current employee needs. The team evaluates what's working, what's missing, and how best to support the entire workforce, and whether that means expanding programs or introducing new solutions like financial wellness support.



“We’re intentional about what we offer. If something is going to make a meaningful difference for our employees, we make space for it.”

Brian Casey, Director of Benefits at ADT

ADT is a current client of Addition. No cash or non-cash compensation was provided for testimonials or endorsements.



WHY FINANCIAL WELLNESS — AND WHY ADDITION WEALTH

As financial wellness emerged as a top priority for employees and job candidates alike, the ADT team saw a clear opportunity. While the company offered financial tools like EAPs and retirement benefits, those solutions were often highly specific and underutilized. What was missing was something more integrated and accessible. And that's where Addition Wealth came in.

“One thing I really like about Addition is that it ties everything together,” said Casey. “We had all these point solutions that were narrow. Addition really bridges that gap and helps employees connect the dots.”

Curious to understand the employee experience first-hand, he scheduled a one-on-one session with a financial advisor. “I had a question I’d always wondered about — whether it’s better to close old credit card accounts or leave them open,” he said. “The advisor explained it clearly, and it was just one of those things that had always nagged at me. Hearing from an expert gave me clarity.”



MEETING EMPLOYEES WHERE THEY ARE

With a workforce as diverse as ADT's, from corporate staff to call center employees and field technicians, financial needs vary widely. And the fact that many employees face financial stress is a common theme, one that we hear from employees across the companies we work with consistently. From saving for a home or college, to managing credit card debt or simply trying to make ends meet, financial uncertainty is a reality for a significant portion of the population.

"A lot of our employees live paycheck to paycheck," Casey shared. "And when you're just trying to cover your bills, saving for retirement feels like a luxury."

Encouraging employees to participate in retirement plans has historically been a challenge. Even with a strong 401(k) match, about two-thirds of ADT employees are currently enrolled. "For many, it's not a lack of interest - it's a lack of understanding and the perception that saving isn't possible right now," Casey explained. "That's where Addition makes a real difference. By helping employees prioritize, make confident choices, and take small, achievable steps, we're turning saving for the future into something that feels within reach."

LAUNCH & IMPLEMENTATION: FAST, FLEXIBLE, AND EMBEDDED IN ADT'S CULTURE

For ADT, implementation with Addition Wealth was collaborative, responsive, and easy, according to Casey. The onboarding process quickly turned into a true partnership focused on reaching employees where they are, even if that meant starting before sunrise.

That commitment was visible during ADT's early-morning technician meetings. These live sessions, held as early as 6:30 a.m., gave field employees direct access to Addition Wealth. Recordings were also made available for those who couldn't attend, ensuring no one missed out. The sessions were cross-promoted to employee resource groups (ERGs), which include Women's and Mental Wellness to Veterans and Young Professionals, maximizing exposure and accessibility.

ADT also amplified the program during their vendor summit and benefits fair, where Addition Wealth engaged with employees in real time, fielding questions and offering guidance.

EMPLOYEE FEEDBACK

I have been struggling with debt management and I believe the info I received today will absolutely help get started knocking it out."

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EMPLOYEE FEEDBACK

“Great breakdown for 101 financial focus. This makes me want to work with you to lower my debt. Thank you!”

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It wasn't just about rolling out another benefit — it was about showing up for employees and making sure every base was covered. And that's what made the partnership work.

ADT employees get a seamless, end-to-end experience. Employees have access to 1:1 sessions with financial professionals on credit, budgeting, debt, homebuying, and much more. Addition Wealth runs live webinars and group sessions tailored to ADT audiences like ERGs and technician teams, providing a digital platform with tools connecting everyday money decisions to benefits such as the 401(k), medical plans, and HSA/FSA accounts. Addition Wealth's financial advisors also provide thoughtful follow-ups to reinforce action plans that help guidance stick.

REAL IMPACT, REAL CONVERSATIONS

Since launching the program, the feedback at ADT has been consistently positive. Data shows that people are feeling seen, supported, and better equipped to make financial decisions, backed by a 10/10 webinar rating.

ADT employees have brought a wide range of questions to their one-on-one sessions with Addition Wealth's financial professionals - from how to start saving for college or a home, to tackling credit card debt and managing finances on a tight budget. For many, these are deeply personal questions that would never make their way to HR. But with a trusted, confidential resource, employees feel empowered to ask and act.

“What I would tell another HR leader,” said Casey, “is that people come to us with complicated lives, student debt, low wages, stress about their kids or retirement. Addition Wealth helps them sort through all of it in a way that's digestible and actionable. It meets people where they are and gives them a real plan.”

For ADT, financial wellness isn't a one-time initiative. It's part of a long-term vision for employee support. As the company evolves, so too will its approach to benefits, with a continued focus on listening, responding, and providing tools that make a real difference. With Addition Wealth as a partner, ADT is building a more financially confident workforce that is stronger, and with a more resilient culture along the way.





"I've been attending all the virtual sessions you've offered through ADT and LOVE it. My husband and I have been implementing some of these strategies for a little while now and it's so reassuring to hear that we're on the right track."

-ADT Employee

"This is my first experience and I am so sorry to say that! I wish I'd looked at your services sooner, especially with ADT taking care of the cost for that. I will definitely be taking advantage of those one on ones you spoke about!"

-ADT Employee

"I think the webinars and the Q&A sessions are tremendously helpful, and I appreciate how knowledgeable the financial planner on our webinars is."

-ADT Employee

"My overall experience with Addition was great, it's been on my mind since the webinar ended. It left me wanting to know more about high yield savings accounts and planning my life for my future."

-ADT Employee

Addition

Addition Wealth is a holistic financial wellness platform that empowers employees to make smart, informed financial decisions.

By taking a tech-forward approach that combines digital tools, community events, expert content, and access to financial professionals, Addition is making personalized financial expertise inclusive and accessible for all employees.

Find out how Addition can help your organization

[ADDITIONWEALTH.COM](https://additionwealth.com)