

NEWS

For immediate release

Media Contact:

Dori Thomas

Impact Communications, Inc.

913-649-5009

DoriThomas@ImpactCommunications.org



StraightLine Chooses Financial Wellness Labs to Improve Employee Financial Well-being and Retirement Readiness

Focused on supporting employees dedicated to serving others in academic, healthcare, and nonprofit sectors

TROY, MI (February 11, 2026) – [StraightLine Group](#) LLC (StraightLine), an independent SEC Registered Investment Advisor (RIA) and financial planning firm, today announced it is integrating financial wellness education with its traditional financial planning and investment advisory services. StraightLine has built this offering in collaboration with [Financial Wellness Labs, Inc.](#), the parent company of [Questis](#), an evidence-based financial wellness platform that combines technology with access to “Certified Financial Coaches”.

“We’re excited about our relationship with StraightLine, which exemplifies how our financial wellness platform can be integrated with fiduciary advisory services to make a real difference,” said Lynn Raynault, CEO & Co-Founder of Financial Wellness Labs. “We believe StraightLine’s approach represents a best practice for driving engagement, helping participants manage day-to-day financial stresses while preparing for longer-term goals such as retirement.”

While StraightLine works with employees across all types of retirement plans, 403(b) plans have become one of the firm’s core areas of expertise. The firm has a long history of serving faculty and staff at colleges, universities, and nonprofit institutions, and regularly works with plans administered by leading providers in the 403(b) space, including both TIAA and Fidelity.

“We expect this enhanced approach will help recognize that every employee is on a unique financial journey,” stated Mike Bisaro, AIF®, President and CEO of StraightLine. “By bringing financial wellness, financial planning, and participant-level investment advice together, we can deliver a full spectrum of advice and education that ranges from foundational financial coaching to fiduciary investment advisory services.”

WORKPLACE PLANS IMPORTANT FOR THOSE IN HIGHER EDUCATION

Bisaro recently shared similar insights in [an interview with Barron's Advisor](#), where he discussed StraightLine's niche serving retirement plan participants in higher education. The story highlighted the firm's commitment to providing advice where it matters most – within the retirement plan itself. For many employees, especially in higher education, the workplace retirement plan represents their largest financial asset, yet it is often the area where they receive the least personal guidance.

In addition to being a client of Financial Wellness Labs, several key members of StraightLine's executive team and ownership have made direct investments in Financial Wellness Labs, Inc. This reflects StraightLine's conviction in a financial wellness education model that complements, rather than competes with, the firm's traditional financial planning and advisory services.

“Part of what attracted us to Financial Wellness Labs was not only the technology combined with the human element of financial coaching, but the fact that Questis is not an investment adviser,” said Rob Rickey, Chief Growth Officer at StraightLine. “That structure allows financial wellness to integrate seamlessly with our fiduciary model and ultimately can lead to better outcomes for participants. By being an investor, we have a seat at the table to help guide the evolution of the platform, ensuring it continues to serve as a leading solution for delivering financial wellness through independent investment advisors,” Rickey added.

An industry veteran, Rickey spent more than 25 years at TIAA, where he played a pivotal role in building the firm's independent advisory platform, expanding access to independent, unbiased fiduciary advice within retirement plans by firms like StraightLine. In addition to his responsibilities at StraightLine, he now serves on the advisory board for Financial Wellness Labs, further supporting the firm's mission to deliver effective financial wellness solutions.

For employers, integrated financial wellness combined with participant-level fiduciary advice and management provides measurable value. This structure supports employee well-being, workforce resilience, and retirement readiness, while helping organizations attract and retain top talent. The model is particularly effective in nonprofit, academic, and healthcare sectors because major recordkeepers such as TIAA and Fidelity provide the infrastructure needed to deliver independent RIA services at the participant level. When structured properly on these platforms, institutions can offer a high-impact program at a reasonable cost, delivering meaningful value to employees without creating an undue financial or administrative burden on the institution.

Employers interested in offering this integrated financial wellness and advisory solution to their staff are welcome to contact StraightLine to learn how the program can be tailored to their workforce and institutional goals.

ABOUT STRAIGHTLINE GROUP

StraightLine Group LLC (StraightLine) is an SEC registered investment advisor. Based in Troy, Michigan, their experienced financial professionals provide a full suite of financial planning, portfolio management, investment advisory, and retirement planning services to clients across the country. StraightLine works as an advisor and partner to individuals and families, businesses, and institutions. StraightLine has a strong passion for helping others and offers customized solutions to discerning clients.

Mike Bisaro AIF[®], President and CEO, was recognized by [ThinkAdvisor at the 2025 Luminaries](#) where he was awarded a Luminaries with a Heart Award. In addition, he was named to [InvestmentNews Hot List](#) for his work with young advisors. Bisaro has dedicated his time as a transformational force in the financial services community, breaking down barriers for next-generation advisors through education, mentorship and advocacy. To learn more about the firm's guiding principles and service offerings, visit www.StraightLine.com.

Disclosures: *Mike Bisaro was named to the InvestmentNews Hot List 2025 in November of 2025 using 2025 calendar year data by InvestmentNews. Neither Mike Bisaro nor Straightline Group LLC provided compensation for inclusion in this list.*

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