FINANCIAL WELLNESS PLATFORM

Individualized Employee Assessment

Tailored Education

Financial Professional Support (Solution Based & Full Planning)

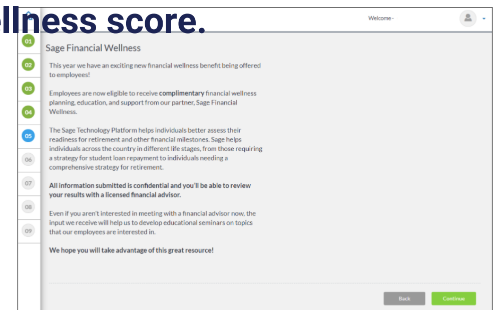
Group Level Data

On and Off Enrollment Capabilities

Benefit Administration Integration Capabilities

Individualized Employee Assessment

- **Our software brings financial wellness through a simple 3-5 minute assessment.**
- **The individual will then be given their financial wellness score.**
- **You then have the opportunity to book a meeting with a financial professional to review your results, or to help you with any other questions you may have about your financial wellness.**



64%

Voluntarily Completed the Tool

35%

Directly Booked a Meeting

25%

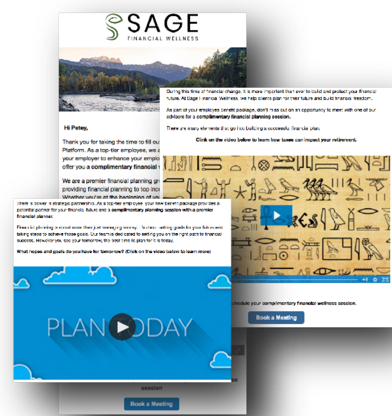
Booked a meeting after receiving tailored education content

Tailored Education

We ensure a variety of educational delivery to match learning styles of different generations. A mixture of live and on-demand is included. Everything is tailored to the group and individual needs identified..

For the Individual

Based on the answers to their assessment, the individual will receive a series of customized email campaigns designed by financial advisors..



For the Group

Based on the aggregate data of the group, live webinars will be delivered over the top group concerns.

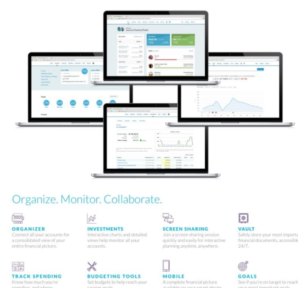
Financial Professional Support

Year-Round Access

Our financial professional are available year round. From reviewing assessment, answering questions, helping with qualifying events and onboarding.

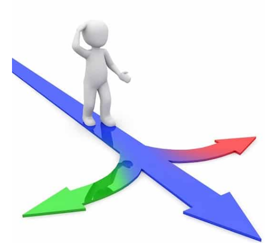
Personal Financial Dashboard

Our advisors support and help build a personal dashboard that will link all the employee's accounts, creating a full picture of their future.



Triage

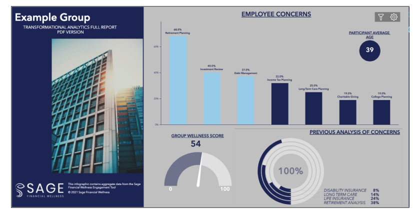
Individuals who seek out an appointment will be triaged to ensure they are seeing the right level of financial professional and the process meets their unique needs. We offer solution based and full planning supported by CFPs.



Group Level Data

Allows for Overall Group Assessment

Our data team confidentially compiles group level data to review with lead consultants and HR. Data can be broken down by site, industry and more.



Tracking Engagement and Trends

We will review over time how well your group is improving, what education platforms are the engaging in most, and how can we improve together.

Discovery of New Opportunities

Data can help uncover gaps in current benefit offerings. Together we can create a solution that works for all parties involved.

On and Off Enrollment Capabilities

Whenever the Time is Right

We are able to launch during open enrollment and off open enrollment as a stand alone. We will work with you and your worksite to determine which works best for the group.

Integration on Benefit Administration System

Seamless Approach

Our Financial Wellness assessment can be integrated into your Benefit Administration System. This allow employees to begin their financial wellness assessment as a part of your active or non-active enrollment.