

Financial Wellness Starts With **EDUCATION**

SmartPath empowers your employees to change their behavior and gain financial independence

Today more than ever, employees are looking for a holistic benefits package that prioritizes their overall wellness. Providing financial education to your workforce sets you apart from the competition and helps employees build a sustainable future within your organization.



Partnering With SmartPath

Your employees gain access to a comprehensive financial education platform with personalized resources and support. We've spent nearly 250,000 hours curating the best content, training our educators, and refining our platform to help users make sense of their financial lives and reduce their stress about money. Let us help you stand out from the competition by providing holistic financial wellness for your employees.

Key Benefits



Increase 401(k) Contributions

We educate your employees about their retirement benefits and help them find creative ways to save more now.



Drive Benefit Participation

SmartPath provides an integrated Resources page where you can share information about your benefit offerings and connect your employees with appropriate resources.



Enhance DEI Strategy

Our classes are designed to meet the needs of diverse learners and are a great opportunity for ERGs to provide targeted education to specific audiences.



Boost Employee Satisfaction

SmartPath gives your employees freedom from financial worries, improving their overall well-being and increasing their satisfaction at work.



Improve Employee Retention and Acquisition Efforts

Attract and retain top talent by offering a more competitive compensation package.

SmartPath **LEARN**

- ✓ **Live Classes:** SmartPath instructors are highly trained and teach interactive classes daily at various times to accommodate busy schedules. Classes are also recorded and available on-demand, 24/7.
- ✓ **Topic Variety:** Our classes answer the nitty gritty questions about planning for children, taxes, medical bills, buying a house, retirement, and everything in between. Many of our most popular classes are also available in Spanish.
- ✓ **Automated Communications:** Personalized class recommendations based on employee demographics are delivered at an agreed-upon cadence via email or SMS text.

SmartPath **COACH**

- ✓ **Highly Qualified Instructors:** All SmartPath coaches are licensed fiduciary professionals, with at least 15 years of experience.
- ✓ **Dedicated Support:** Your employee will meet with the same coach every time, creating a healthy accountability structure that drives behavioral change.
- ✓ **Spanish Coaching:** The entire user experience is available in Spanish, including personal coaching, our platform, and all user communications.

Frequently Asked **QUESTIONS**

How does pricing work?

SmartPath Learn charges per employee, per year and can be paid for with plan assets, wellness dollars, or department budget. Annual contract or discounted multi-year contract options are available. SmartPath Coach pricing is tiered based on the number of hours purchased.

How does SmartPath communicate with employees about their benefits?

SmartPath educates employees on how to maximize their benefits around open enrollment. In addition, if you provide us with the link for your intranet or benefits platform, we can redirect your employees through an embedded Resources page, making it easy for them to see what's available and enroll.

How do you automate onboarding and ongoing program management?

At kick-off, you'll provide us with an employee eligibility file. We'll take it from there! Automated emails will be sent at an agreed-upon cadence to keep employees informed about upcoming classes and make other important announcements. You'll also be paired with a dedicated account manager to answer questions and provide direction throughout the process.

Can I measure the impact of offering SmartPath to my employees?

Your dedicated account manager will provide you with quarterly engagement reports that show how your employees are engaging and give you key insights into their financial health.


Ready to get started?
LET'S TALK!


Contact us at hello@joinsmartpath.com or 888-686-5808.


About SmartPath

SmartPath is the leading provider of comprehensive financial education solutions in the country. Its robust offering includes daily educational classes, one-on-one coaching, and digital tools that empower individuals on the journey to financial freedom. Founded in 2010 and supporting over 600,000 individuals, SmartPath delivers its financial education solutions in partnership with financial institutions, fintech companies, and employers nationwide. For more information, visit www.joinsmartpath.com.



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