

# Financial **EDUCATION** for Plan Participants

Drive growth, increase participation, and differentiate your practice with SmartPath

Your plan sponsors expect participant education as a part of your services. When you provide an outsourced financial education program, you receive the dual benefit of saving time and money, while also building loyalty and longevity with your plan sponsors.



## Partnering With SmartPath

Give your participants access to a financial education platform that integrates seamlessly with your practice. Over the past decade, we've spent over 250,000 hours building a comprehensive program that makes it easy for you to offer world-class education on a consistent basis with no added hassle. Let us give you the edge your business needs to stand out from the competition and drive growth.

### Key Benefits



#### **Increase AUM**

Proactively educate plan participants on the importance of contributing to a 401(k) directly impacting your bottom line.



#### **Save Time**

Outsourcing saves you and your team valuable time. From creating the content to tracking the results, we do it all.



#### **Gain Valuable Insights**

Participant data helps you identify opportunities to upsell or cross-sell additional products and services.



#### **Automated Program Management**

You provide a participant file and we send personalized recommendations via email or SMS text with easy, one-click class registration.



#### **Stay Top of Mind**

On the dashboard, display your logo and share custom links via our Resources page to redirect users to your site or materials. You can also leverage built-in messaging capabilities to easily stay in touch with participants.



#### 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.

## Frequently Asked QUESTIONS

### How does pricing work?

SmartPath typically charges per participant, per year and can be paid for by the advisor, with plan assets or wellness dollars, or directly by the plan sponsor.

### How does SmartPath increase revenue?

The cost per participant, per year is so low that you can easily add a slight markup and see a considerable ROI.

### Can I measure the impact of offering SmartPath to my plan sponsors?

Yes. The impact can be measured over time in AUM growth from increased participant contributions and revenue from new wealth management clients identified through SmartPath's lead generation capabilities.

### Does SmartPath work in conjunction with existing financial wellness resources?

Yes, our financial education solution works in conjunction with other financial wellness programs and tools.

Ready to get started?

**LET'S TALK!**

Contact us at [hello@joinsmartpath.com](mailto: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](http://www.joinsmartpath.com).



 (888) 686-5808

 [hello@joinsmartpath.com](mailto:hello@joinsmartpath.com)

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