

SmartPath In Brief

Your Financial Education Partner

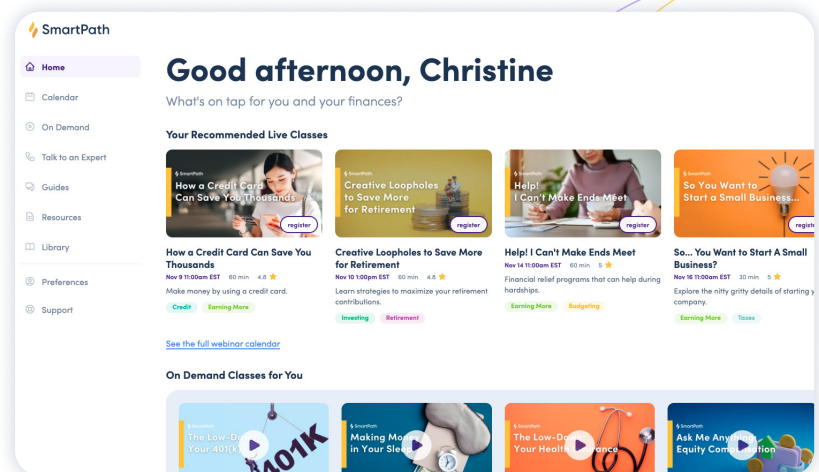
Whether you are trying to increase 401(k) contributions, strengthen client relationships, or boost engagement in benefits, SmartPath can help. Our financial education solutions are designed to empower individuals to make better money decisions while helping companies achieve their business objectives.

WHAT IS SMARTPATH?

SmartPath offers an online educational platform that guides users on a personalized learning journey.

Our Core Offering

- ✔ Live classes, taught daily by our certified experts
- ✔ An on-demand video library available 24/7
- ✔ Tools, quizzes, articles, self-paced courses, and more
- ✔ One-on-one financial coaching



Popular Features

Messaging and Communications

We offer co-branded engagement and marketing campaigns delivered directly to users, giving you year-round visibility, without lifting a finger.

Personalized Recommendations

Our platform and communications leverage AI to offer customized recommendations to every user.

Customer Portal

Our unique portal gives detailed, real-time reporting so you can easily see how users are engaging with content.

Spanish Accessibility

Our platform, communications, and many popular classes are available in Spanish.

YOUR TRUSTED PARTNER



Nearly 15 Years
Providing Financial
Education



99%
Client Retention



Over 700,000
Users Supported
and Counting!



2024
Inc. 5000 Fastest
Growing Company

THE SMARTPATH DIFFERENCE

Over the past decade, we've taken a data-driven approach to refining our product to give users exactly what they need. We're proud to deliver targeted education that engages users and leads to real change.

81%

Users who took intentional action in their 401(k)*

\$282

Increase in retirement contributions per user, per year*

72%

Users who feel equipped to make a future decision or change

84%

Users who feel better about their organization

Not sure how SmartPath aligns with your business goals?

SOLUTIONS FOR



Retirement Plan Advisors



Increase contributions by educating participants on retirement planning and giving them strategies to optimize their savings.



Employers



Spend less on healthcare and improve retirement contributions by providing a comprehensive financial wellness solution.



Insurance Brokers



Differentiate your insurance offering by including a tailored financial wellness solution.



Fintech Companies



Integrate financial education into your own ecosystem as a value add for your users.



Banks & Credit Unions



Build customer loyalty and trust by providing a valuable, add-on feature to your existing products.

Ready to get started?

LET'S TALK!


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


*Numbers are from a client research study conducted by SmartPath. Ask for the full study or download it at www.joinsmartpath.com.


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 700,000 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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