

# SmartPath In Brief

## Your Financial Education Partner

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

### WHY SMARTPATH?

Our experience in this space speaks for itself. Over the past decade, we've spent more than 220,000 hours honing our platform and becoming the largest financial education provider in the U.S.



**13+ Years**  
Providing Financial  
Education



**99%**  
Client Retention



**600,000+**  
Users Supported



**2023**  
Inc. 5000 Company

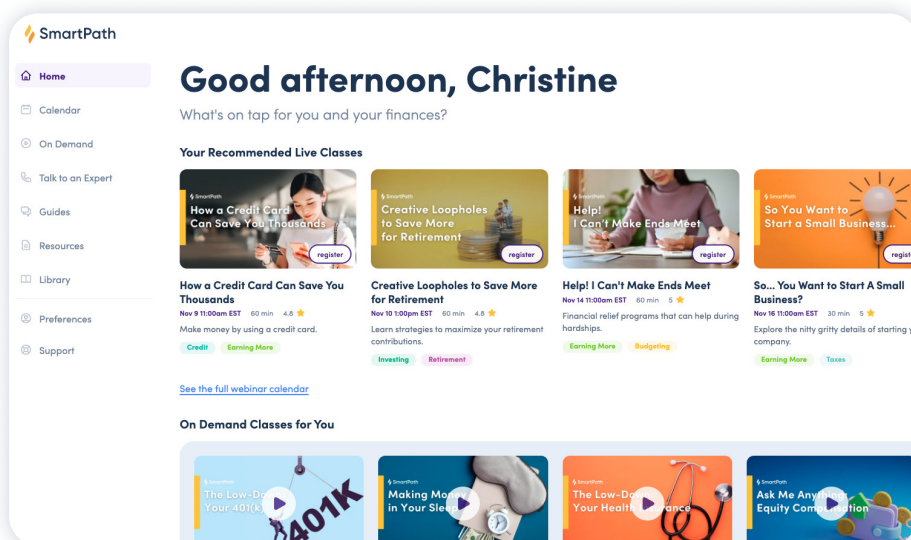
### OUR PRODUCTS

#### SmartPath LEARN

- ✔ Live classes are offered daily at various times to accommodate busy schedules
- ✔ Personalized class recommendations based on user demographics are delivered via email or SMS text
- ✔ An on-demand video library gives users access to content anytime, anywhere
- ✔ The product platform, communications, and many popular classes are available in Spanish

#### SmartPath COACH

- ✔ Coaches are licensed professionals, obligated by their fiduciary duty to act in the best interest of their clients
- ✔ Each team member has at least 15 years of financial experience—that's over 100 years combined
- ✔ Coaches are available seven days a week across the U.S.
- ✔ Users will work with the same dedicated coach every time they call



#### PRODUCT SPOTLIGHT

### SmartPath's AI-Driven Personalization Engine

Our proprietary AI-powered personalization engine ensures that each user achieves maximum benefit through personalized class recommendations based on their unique demographics and interests.

## A SOLUTION FOR EVERYONE

Not sure how SmartPath aligns with your business goals? We educate your population to make sound financial decisions and then deliver key insights and learnings back to you.



**Increase**  
contributions by educating participants on retirement planning and optimizing their savings.



**Create**  
a more competitive compensation package by adding a financial wellness solution.



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



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



**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](mailto:hello@joinsmartpath.com), 888-686-5808  
or visit [www.joinsmartpath.com](http://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 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)

 [www.joinsmartpath.com](http://www.joinsmartpath.com)