SmartPath

SmartPath PROGRAM Specs

Why SmartPath?

Experienced
We've spent 250,000 hours over 14 years building the best financial education program in the country.

Unbiased
We are an education provider. Our only goal is to offer unbiased, financial advice. We never sell products or services to our users.

Trusted
Our retention record speaks for itself. We have a 99% client retention rate and have been trusted by industry leaders for over a decade.

The SmartPath Advantage

Maximize Profits
Leverage our platform to identify sales opportunities or drive action based on key user insights.

Tailored Solutions
Enjoy unparalleled flexibility with our highly customizable program, designed to align with your unique business goals.

Effortless Program Management
Our proprietary AI algorithm drives personalized class recommendations via email at an agreed-upon cadence. You'll have the option to include custom messaging, like company updates, a general greeting, or a survey question.

In-Depth User Insights
Access lists of engaged users and take control over their journey by using our custom Resources page to seamlessly redirect them to your materials or landing pages.

Spanish User Experience
Our website is available in Spanish, along with captioning on all live and recorded classes, allowing you to engage a diverse user base.

Our Class Development

Our in-house team updates class content and materials regularly to stay current with legislation and market conditions. All our classes are developed to meet these seven criteria:

- Drive action
- Be positive and aspirational
- Exude empathy
- Keep it simple
- Solve a problem
- Don't judge
- Provide context

Our presenters:

- Are credentialed through external organizations (e.g., AFC, CFP, CPFC)
- Complete a two-month intensive course to enhance their online public speaking skills, led by our in-house professionals
- Receive quarterly evaluations of their teaching performance
- Engage in quarterly self-evaluations

Our Financial Coaches

- Coaches are CERTIFIED FINANCIAL PLANNERS™ (CFP®) or Accredited Financial Counselors® (AFC®) with over 10+ years of experience.
- Coaches are encouraged to leverage one another's subject matter expertise and have consistent access to our on-staff Director of Coaching.
- Coaches are available in different time zones to accommodate every schedule. In addition, our SLA is appointment availability within 48 hours of scheduling.
- Coaching appointments are available in English and Spanish.

Our Reporting Capabilities

We provide key user data and insights including:

- Registrations
- Attendance
- Most attended classes
- Data in aggregate by population segments
- User testimonials and success stories

Our Data Security & Privacy Policies

- We are SOC II Type 2 Compliant.
- Our team uses high-level encryption, authentication best practices, and extensive training to keep user data secure.
- For more privacy information, please view our Privacy Policy.

Our Promise

Before we're anything, we're humans. We have a high bar for our people and our program, which is why we always aim to prioritize simplicity and personalized care. High-quality financial education doesn't have to be a headache. Our proven model is crafted to help users address and adjust their habits around money and plan for a sustainable future.