

Don't Just Take Our Word For It...

SmartPath **CUSTOMER** Testimonials

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SmartPath has been the cornerstone of Lumen's financial well-being program since we launched a pilot in 2017. I participated in the original pilot program and it turned out to be the best thing I've ever done for myself and my family. For the first time ever, I could talk with a financial expert openly and honestly—without fear of being judged or belittled. My personal experience has made me the biggest champion of SmartPath and I truly believe every single one of our employees should speak with a SmartPath coach.”

- CHARLIE HO, LEAD BENEFITS ANALYST, LUMEN



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“SmartPath has created a solution for the set of people that have the most to gain from tracking their money. More importantly, they did it in a way that solves our employees' problems in simple terms. This is a company that takes the stress out of financial planning and makes lives better on a global scale.

- KAREN VELKEY, VICE PRESIDENT OF BENEFITS & COMPENSATION, HII

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Without an understanding of how to build a foundation for financial wellness, overall wellness for the diverse performer is unlikely. The team at SmartPath offers the diverse performers at our conferences an actionable framework for addressing this important need.”

- WERTEN BELLAMY, PRESIDENT, STAKEHOLDERS, INC.

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“Your format is engaging—casual but simple and clear, and you make a technically complicated benefit less daunting and easy to understand.

- LALAINA BALOIS, BENEFITS CONSULTANT, LEIDOS

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SmartPath **USER** Testimonials

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SmartPath blends knowledge in an expert way that is beyond useful for all users, at all levels, and at all different life stages and/or tanks. Each presentation flows from a basic overview to in-depth coverage of the given topic, with questions taking users to more and less detailed areas as discussion occurs naturally. It's a great vehicle and is extremely well-managed and conducted by the facilitators.”

- GWEN R., LEIDOS **IT SERVICES & CYBERSECURITY**

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“[I learned that] financial planning is a marathon, not a sprint. It is not too late. I have more communications with my wife about our finances. I need to pass this information on to my children. I feel more confident/smarter because knowledge is power, thanks to your webinars.

- FRANK M., HII **ENGINEERING & DEFENSE TECHNOLOGIES**

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I think the most useful and valuable “perk” we get from our organization is access to SmartPath resources.”

- LUIS V., LUMEN **TELECOMMUNICATIONS**

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“SmartPath made me feel heard, cared about, and more capable to handle money in a simple way, rather than trying to overanalyze it all. I would recommend it to anyone, and the service and follow-ups were so professional and yet customer-oriented.

- EMPLOYEE, HII **ENGINEERING & DEFENSE TECHNOLOGIES**

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Over the last three years, and thanks to working with SmartPath, I've paid off my credit card debt of \$21,000! SmartPath also gave me some tools and tips for budgeting, and we will speak again soon to continue putting together a budget for me.”

- EMPLOYEE, THE LOVETT SCHOOL **EDUCATION**



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.

