

PERSONALIZED Financial Education For Your Customers

Your customers need additional support beyond your products to make strategic financial decisions. Offering financial education facilitates more frequent, high-quality interactions within your ecosystem, allowing you to build customer loyalty, and reinforce your relationships.



Partnering With SmartPath

Become the destination for every stage of your customer's financial journey. With SmartPath, they'll gain access to comprehensive financial education, eliminating the need for endless internet searches or other third-party support. The best part? Our products can be easily integrated into your platform or app to engage your customers more deeply while building loyalty and trust.

Key Benefits



Win More Clients

Attract new customers and recapture lost business with products turbocharged by highly personalized financial education resources.



Amplify Cross-Sales

Leverage novel data about your customers' needs to sell additional products at the right time.



Strengthen Client Relationships

Retain existing customers by becoming their trusted partner for every financial need.



Increase Engagement

Boost the frequency and quality of client interactions and stay top of mind whenever they need a financial resource.

Frequently Asked **QUESTIONS**

How does SmartPath integrate with my product?

We have a robust API where you can gain full access to our content. We also offer integration options, allowing you to curate and embed content that can be accessed by users on your platform.

Can the education offerings be tailored to my segments?

Yes! When you partner with us, we'll work with you to hone our offerings and include content that is most relevant for your segments to maximize engagement.

How does SmartPath help increase cross-sales?

Through the data reporting provided by SmartPath, you'll be armed with key insights into your user's activities and interests, helping you offer the most relevant products and resources for each customer's situation.

How does SmartPath keep user data confidential?

SmartPath has achieved SOC 2 Type II attestation for 4 years now. We take the utmost care with your user data.

How does pricing work? Are there custom solutions?

To meet the varied needs of our customers, we try to keep our pricing as flexible as possible, so you only pay for what you need. We offer our resources a la carte allowing you to tailor your solution to your customers.

Ready to learn more?

LET'S TALK!

Contact us at hello@joinsmartpath.com or
888-686-5808 to get started.

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.

