

Differentiate Your **BENEFITS** Offering with Financial Wellness

In today's job environment, general health insurance benefits have become essential to even the most basic compensation package. Increasingly, employers are looking for a more holistic package that also includes supplemental benefits, like mental health care, a fitness stipend, or unlimited PTO. How can you stand out from your competition in a crowded field? Offer SmartPath, a financial wellness product that truly benefits employees by helping them keep more of what they earn.



Partnering With SmartPath

When you partner with SmartPath, your clients gain access to a comprehensive financial education solution. Our intuitive platform is easy to use and full of relevant financial resources for every major financial decision. We've spent nearly 250,000 hours over the last decade, building the best educational classes so you can enhance your offerings and provide your plan sponsors with a highly customizable benefit that will meet the needs of their unique employee populations.

Key Benefits



Enhances Client Relationships

Deepen your client relationships by offering a plug-and-play solution that allows them to offer a top-requested benefit to employees.



Differentiates Your Product Offering

Outshine your competition with a comprehensive next-generation insurance offering.



Complements Existing Benefits

SmartPath can answer employee questions about how to maximize their benefits package, reducing indecision and driving action.



Automated and Ongoing Program Management

No extra work for you or your clients! The client simply provides an employee file. From there, we'll onboard their employees and send personalized class recommendations via email or SMS text with easy, one-click class registration.



Boosts Engagement

Our platform offers a Resources page where employers can share important information about benefits, and even link out to company pages to seamlessly drive engagement.

Frequently Asked **QUESTIONS**

How does pricing work?

SmartPath charges per participant, per year and can be paid for by the broker, or the plan sponsor with plan assets, wellness credits, or department budget.

How does SmartPath complement my offerings?

SmartPath is an easy-to-integrate financial wellness program that is a top-requested employee benefit. With no extra hassle, your client can add on financial wellness and leverage it as part of their overall benefits strategy.

Which of my clients are most likely to be interested in SmartPath?

While everyone can benefit from SmartPath, the clients who are likely to be your best customers are those who have previously inquired about financial wellness resources, are looking to drive employee participation, and/or already offer other supplemental benefits like mental health care or physical fitness reimbursements.

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.

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.

