

# Enhance Your **PRODUCT** with Embedded Financial Education

Your users already love your product. What if you could offer even more value while gaining key insights and keeping users coming back to your platform? Provide a more complete experience for your users and receive valuable reporting data by offering financial education embedded directly into your product.



## Partnering With SmartPath

Give your users access to a comprehensive financial education solution, without ever navigating away from your product. Our educational content integrates seamlessly into your ecosystem. We've spent nearly 250,000 hours over the last decade, building educational classes, targeted digital courses, one-on-one coaching, and conversational quizzes so you can educate your users without lifting a finger.

### Key Benefits



#### Gain Key User Insights

Learn about the interests and goals of your user base by analyzing data on the most visited resources through clicks, replays, and quiz completion.



#### Earn Customer Loyalty

Increase your value proposition by offering users education within your product and eliminating the need for endless web searching.



#### Increase Revenue

Offer SmartPath to your users at a slight markup to increase your profit margins and simultaneously provide more value to your users.



#### Support Key Decision Making

Provide your users with the information they need at a decision point through just-in-time education.



#### Enhance Your Product

Get ahead of your competitors by offering superior financial education while keeping your users on platform or in app longer.

# Frequently Asked **QUESTIONS**

## **How does integration work? Do you have an API?**

Yes, 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.

## **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.

## **Can I measure the impact of offering SmartPath to my users?**

Yes. The impact can be measured over time by analyzing users' behaviors before and after using SmartPath.

## **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](mailto: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](http://www.joinsmartpath.com).

