

FINANCIAL WELLNESS PROVIDERS: A *SIDE-BY-SIDE* Comparison

There are dozens of financial wellness providers on the market today. How do you make sense of all the jargon and fast talk? How can you quickly find out which will be the most natural fit for your business priorities? In this streamlined chart, we'll give you a detailed breakdown of key features and services, showing you how the competition stacks up and equipping you to make the best decision for your business.

Feature	 SmartPath	SmartDollar	Financial Finesse	FinFit	LearnLux
Live and On-Demand Classes	X	X	X	X	X
Daily Classes	X				
Self-Paced Courses	X	X	X	X	X
Custom Content (Videos, Classes, Courses)	X				
Coaches Certified by External Organizations (CFP® and AFC®)	X		X	X	X
Registered Investment Advisors	X				
Spanish-Speaking Coaches and Advisors	X	X			
Group Coaching	X	X			
AI-Powered Learning	X	X	X		
Personalized User Journey	X	X	X	X	X
Engagement Tracking Portal	X	X			
Dedicated Account Manager	X	X			
Managed Marketing Communications	X	X			
Digital Financial Assessment	X	X	X	X	X
User Activity Tracking	X	X		X	
Spanish User Experience	X	X			
Advanced Accessibility Features	X				
Soc 2 Type II Certified	X				X