

Financial **EDUCATION** for Plan Participants

Drive growth, increase participation, and differentiate your practice with SmartPath

Your plan sponsors expect participant education as a part of your services. When you provide an outsourced financial education program, you receive the dual benefit of saving time and money, while also building loyalty and longevity with your plan sponsors.



Partnering With SmartPath

Over the past decade, we've taken a data-driven approach to refining our product so we can give participants exactly what they need. We're proud to deliver targeted education that engages users and leads to behavioral change. Let us give you the edge your business needs to stand out from the competition and drive growth.

Key Benefits



Drive Revenue

SmartPath can increase your AUM by helping your participants save more. Studies show that participants who interact with SmartPath contribute more than those who don't.



Save Time

Outsourcing saves you and your team valuable time. From creating the content to delivering the education and tracking the results, we do it all.



Uncover New Clients

Participant data helps you identify potential wealth management clients and other opportunities to cross-sell additional products and services.



Maintain Consistent Visibility and Support

Our co-branded platform and messaging is designed to keep you top of mind for participants. Easily redirect them to your advising calendar or other resources and stay in touch by leveraging our targeted marketing campaigns.



Eliminate Administrative Headaches

As your client base grows, SmartPath grows with you! When you outsource, you can easily add new clients and support them immediately without delays or administrative hurdles.



Share Personalized Content

SmartPath's proprietary AI sends customized recommendations based on user demographics, so participants from every generation receive tailored content in their inboxes.

FEATURE SPOTLIGHT

Onboard New Participants Without Lifting a Finger

Ask about our custom retirement education solutions.

Onboarding new participants to your plan doesn't have to be a headache. SmartPath's custom solutions allow you to fulfill your fiduciary responsibility to educate participants and share necessary plan documents, with no extra effort! Design your custom solution by pairing a bespoke video with our ready-made retirement course.

Retirement Course



Lesson 1: The Skinny on Retirement

need help?

complete lesson

Overview

0 of 9 Complete

- ☐ Lesson 1: The Skinny on Retirement 3 min
- ☐ Lesson 2: The 8th Wonder of the World 2 min
- ☐ Lesson 3: Eligibility 2 min
- ☐ Lesson 4: Contributions 7 min
- ☐ Lesson 5: Employer Contributions 4 min
- ☐ Lesson 6: Accounts 2 min
- ☐ Lesson 7: Investments 6 min
- ☐ Lesson 8: Beneficiaries 4 min

Frequently Asked QUESTIONS

How does pricing work?

SmartPath typically charges per participant, per year and can be paid for by the advisor, with plan assets or wellness dollars, or directly by the plan sponsor.

Can SmartPath help increase revenue?

SmartPath can increase revenue in a variety of ways. Studies show that participants who engage with SmartPath contribute more than those who don't, increasing total retirement plan AUM.* SmartPath can also generate new leads to augment your wealth management business and provide an opportunity to upsell or cross-sell additional products and services.

Can I see how participants are using SmartPath?

Yes! Our Customer Portal provides a detailed breakdown of how users engage with classes, coaching, advising, smart tools, and other features. On your dashboard, you can see which classes are the most popular, how and when your participants are engaging, filter by plan sponsor for in-depth insights, and so much more!

How is participant data kept secure?

We are SOC 2 Type II compliant and leverage high-level encryption and authentication best practices to keep user data secure. In addition, our team participates in regular security and data privacy training.

*Data is from a client research study conducted by SmartPath. Ask for the full study or download it at www.joinsmartpath.com.

Ready to get started?

LET'S TALK!

Contact us at hello@joinsmartpath.com, 888-686-5808
or visit www.joinsmartpath.com.

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 700,000 individuals, SmartPath delivers its financial education solutions in partnership with financial institutions, fintech companies, and employers nationwide. For more information, visit www.joinsmartpath.com.



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