PARTICIPANT EDUCATION

Do-It-Yourself OR Outsource It?

Are you tired of the administrative headaches caused by running your own participant education program? Are you struggling to create and deliver fresh, relevant content? Do you spend more time traveling to educate and train participants than managing their money?

If you answered yes to any of these questions, it may be worth considering a third-party financial education partner. Here is a side-by-side comparison to help you evaluate the advantages of an outsourced model.

Do-It-Yourself	Key Pain Point	SmartPath
Contributions vary per participant and often stagnate	**Contributions**	✓ Can increase AUM by as much as $282 per participant per year
No easy way to uncover new wealth management clients or identify opportunities to upsell current clients	**Prospecting**	✓ Enhances private wealth prospecting efforts through built-in lead generation capabilities and provides opportunities to upsell products and services
Costly and time-intensive to travel to customer locations	**Time**	✓ Saves time and expense, while providing education 24/7, 365
Burdensome to create new content and prepare for on-site meetings	**Content**	✓ Provides over 200 topics instantly, without the burden of content creation and meeting prep
Manual onboarding for new participants requires internal resources and time	**Scalability**	✓ Automates onboarding, making it easy to service new participants as your business grows
Challenging to regularly stay in touch with all participants	**Visibility**	✓ Ensures year-round visibility and support for every participant
Custom messaging is time-intensive so communications are often one-size-fits-all	**Communications**	✓ Communications are personalized to each user's unique demographics with the option to include custom messages from your firm
Challenging to track and maintain participant data	**Data and Insights**	✓ Makes data easily accessible through a Customer Portal for regular monitoring

(888) 686-5808 hello@joinsmartpath.com www.joinsmartpath.com

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