CASE STUDY

How Branch Uses Addition Wealth to Offer Financial Wellness to Employees

ABOUT BRANCH

Home and auto insurance that's simple to buy and built for savings.

EMPLOYEES

250

HEADQUARTERS

Columbus, OH

ADDITION WEALTH OFFERING

- Financial wellness platform
- Virtual webinars and events
- Unlimited one-on-one access to financial professionals

OVERVIEW

Branch is a home and auto insurance company using the power of community to reinvent how insurance works, guided by mutual reciprocity and a culture centered on care and connection. The company is intentional about creating benefits that are accessible, human, and easy to use.

As a remote-first team, Branch makes it simple for employees to engage by using the meetings and channels they already trust, supported by clear and consistent communication. Addition Wealth aligns perfectly with this approach by providing a digital platform that gives employees access to financial professionals, webinars, and educational sessions that turn questions and uncertainty into confident action.

Together, Branch and Addition Wealth are helping employees feel supported, informed, and empowered in their financial lives.

CASE STUDY

HOW BRANCH BRINGS COMMUNITY VALUES INTO FINANCIAL WELLNESS

Branch is a modern insurance company built on a belief in mutual good. Headquartered in the U.S. with a fully remote workforce spread across the country, the company combines cutting-edge technology with a sense of community to make insurance more accessible and human. As a registered B Corp and Public Benefit Corporation, Branch deeply values employee wellbeing and takes a holistic approach to building the company its people want to work for.

With 250 employees and a culture rooted in connection, wellness, and transparency, Branch wanted benefits that support people professionally and personally. As a team spread across 32 states, they prioritize accessibility and ease of use, pairing clear communications with live, one-on-one guidance employees actually value. Branch also backs its people-first stance structurally, and the People team actively removes friction with turnkey reminders, recordings, and visibility. The result is a benefit experience that reflects Branch's community ethos: human, practical, and easy to use, making Branch a place where employees can do great work and feel genuinely supported.

"We knew if we were going to offer equity, we needed to provide support to help people understand how to engage with it in a healthy way,"

Allie Manning, Senior People Experience Specialist

*Branch is a current client of Addition. No cash or non-cash compensation was provided for testimonials or endorsements.

HOW FINANCIAL WELLNESS SUPPORTS THE ENTIRE EMPLOYEE EXPERIENCE

Branch's Senior People Experience Specialist, Allie Manning, helps guide every touchpoint of the employee journey, from internal communications to wellness initiatives. When the company began granting equity to employees, the team realized they needed a way to help people understand what it actually meant.

While the initial intent was to find a solution that could help explain stock options, the People team at Branch quickly recognized the broader need that employees wanted clarity and support in all areas of their financial lives.

CASE STUDY

Addition | BRANCH

A FINANCIAL WELLNESS PROGRAM THAT FITS SEAMLESSLY INTO EMPLOYEES' LIVES

Branch partnered with Addition Wealth to offer employees a truly personalized financial wellness benefit. Through live webinars, one-on-one financial planning sessions, and digital tools, employees can get guidance on everything from retirement planning to budgeting to understanding their benefits.

"People love that they can meet one-on-one with a financial advisor," said Manning. "We consistently hear that the human element is what sets this apart, it's not just a list of resources. It's access to real, personalized help."

The onboarding experience was smooth and deeply integrated into Branch's existing systems. Addition Wealth joined existing team meetings, sent out helpful communications, and even provided pre-written Slack messages for Manning to copy and schedule for the year.

"The omnichannel support has been incredible," said Manning. "Emails, webinars, Slack reminders, it's all so easy to roll out. I don't have to build communication from scratch, which makes it possible to keep the benefits top of mind."

A FAST, FLEXIBLE LAUNCH THAT BECAME PART OF BRANCH'S CULTURE

Manning and her husband have personally taken full advantage of Addition Wealth, replacing their paid financial advisor with the platform's expert services. From planning for a baby to assessing insurance coverage during open enrollment, she's scheduled more than six sessions over the years, and continues to recommend the platform with confidence.

The feedback from employees has echoed her experience. Team members often follow up to share how impactful their sessions were, mentioning advisors by name and appreciating the clear, judgment-free approach. Even during all-hands meetings, anonymous personal finance questions pour in when Addition hosts sessions.

"The continued demand tells me this benefit is working. Every time Addition comes in, someone walks away with a question answered. That's what matters most."

EMPLOYEE FEEDBACK

"I like to personally test anything I'm going to recommend. Every time I've used Addition, I've left feeling more empowered and better equipped to make decisions."

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EMPLOYEE FEEDBACK

"I'm young and don't really have a background in finance. I'm also from a different country so I can't really ask my parents or friends about this stuff because they don't have the same experience. So for me, having this is very beneficial. I need it."

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For Branch, the value of Addition Wealth isn't just about financial literacy, it's about delivering on the promise of building a company people want to work for. Manning says that if companies are investing in compensation strategies, they owe it to their people to make those benefits usable.

"If your employees don't know how to engage with their compensation or benefits, you're leaving opportunity on the table. Addition helps people maximize what they already have."

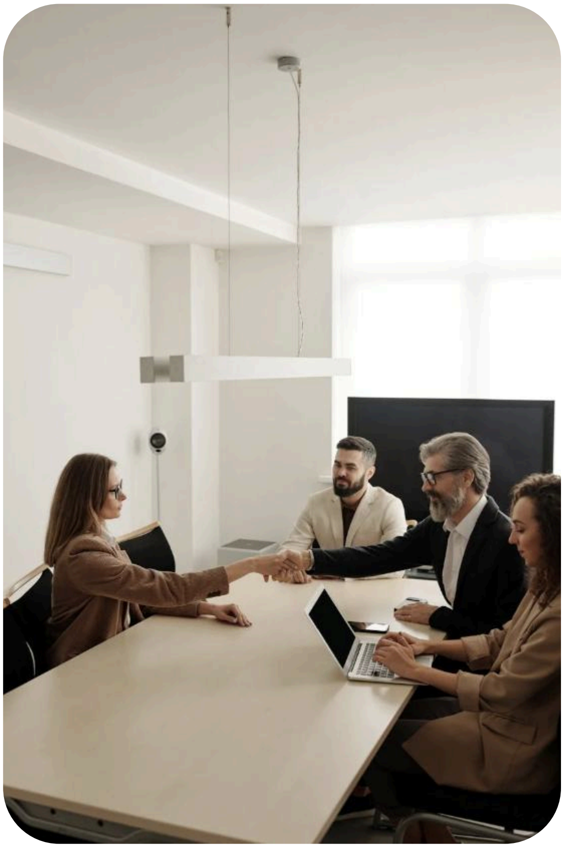
A PARTNERSHIP THAT DRIVES REAL IMPACT

Though equity was the original reason Branch partnered with Addition, the platform has become a foundational part of their wellness strategy. From saving the People team time to providing support employees can actually use, Addition has become more than a vendor, it's an extension of the Branch team.

"It's so easy. And it helps us make sure employees are getting the resources we think are really valuable."

Branch is a company that truly puts people first and chooses partners who help it deliver. By insisting on accessibility, clarity, and real human guidance, Branch turns benefits into actions employees actually take.

Addition Wealth fits that standard by showing up in existing channels, keeping comms turnkey, and turning questions into confident decisions. The result is an employee experience that's practical, human, and consistently used.



"I'm looking forward to my 1:1 with a financial advisor. I've gotten a lot of linkedin messages from financial advisors trying to grow their book of business and the fact that Branch offers this to us as a benefit and we can get unbiased financial guidance is really great."

-Branch Employee

"I met with an advisor through Addition, and he uncovered that my CPA had filed my business sale incorrectly, it should have been a long-term gain, not a short-term one. I ended up getting a major tax refund because of that conversation."

-Branch Employee

"Thanks so much. You all are amazing. Branch Employees, I can't tell you how amazing this tool and benefit is. It is great not just for equity compensation, but for other financial questions as well."

-Branch Employee

"So grateful for my advisor. He reviewed my family's life insurance policies, caught some redundancies that lead to significant savings for us!"

-Branch Employee

Addition

Addition Wealth is a holistic financial wellness platform that empowers employees to make smart, informed financial decisions.

By taking a tech-forward approach that combines digital tools, community events, expert content, and access to financial professionals, Addition is making personalized financial expertise inclusive and accessible for all employees.

Find out how Addition can help your organization

ADDITIONWEALTH.COM