Personalized Financial Wellness Center

Personalized financial education and wellness solutions for every investor's journey

Rolling out a dynamic financial education solution that investors genuinely engage with is not a one-size-fits-all approach. Investors expect a personalized experience, whether they're a millennial calculating a college loan repayment on their phone or a near-retiree budgeting for a fixed income future on their desktop. If you want your educational resources to positively impact investor behavior and outcomes, you need a targeted, flexible solution that delivers a compelling, tailored user experience.

With the flexibility to customize modules to your needs, the Personalized Financial Wellness Center allows you to select the modules that matter most to your business. Designed with a modular framework, you can configure the Center to meet your branding guidelines, compliance requirements, and system integration standards. Choose from an array of rich content, tools and personalization modules that include:

- Wellness and educational topics covering the full breadth of life stages
- Interactive quizzes, curriculum, and milestones that align with your users' profiles, needs, and interests
- Reports summarizing key fndings and benchmarks
- Gap analysis tool informs investors if they are on track to meet their financial goals or have a deficit, and accounts and assets can be pulled in through an account aggregation option

No matter which modules you select, investors have the tools necessary to prepare for retirement, improve their outcomes – and ultimately increase their AUM (assets under management).

Benefits to the investor

- Plan for personal financial objectives – college planning, long-term savings goals, and debt management
- Work toward a secure retirement – increase financial literacy level for more informed, confident retirement planning choices
- Lower stress – improves work productivity and physical well-being
- Take action – complete financial wellness quizzes and milestones to help address deficiencies
- Get recognized and rewarded – earn points each time an activity is completed; you can decide on the incentive

Benefits to the employer

- Fiduciary considerations – shows effort to act in best interest of employees
- Enhanced competitive benefits position – improve employee loyalty through increased engagement with the retirement plan and/or benefits incentives
- Calls to action – drive investors to the next best action, such as linking to specific transactions or guiding investors to additional resources
- Cost savings – a variety of pricing options available
- Ease of implementation – lowers demand on in-house resources
- Centralized document repository – tailored to the individual program for easy access to specific documents and forms
- Access to reports – provides aggregate results from quizzes and curriculum modules

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Personalization drives investors to learn more and save more.

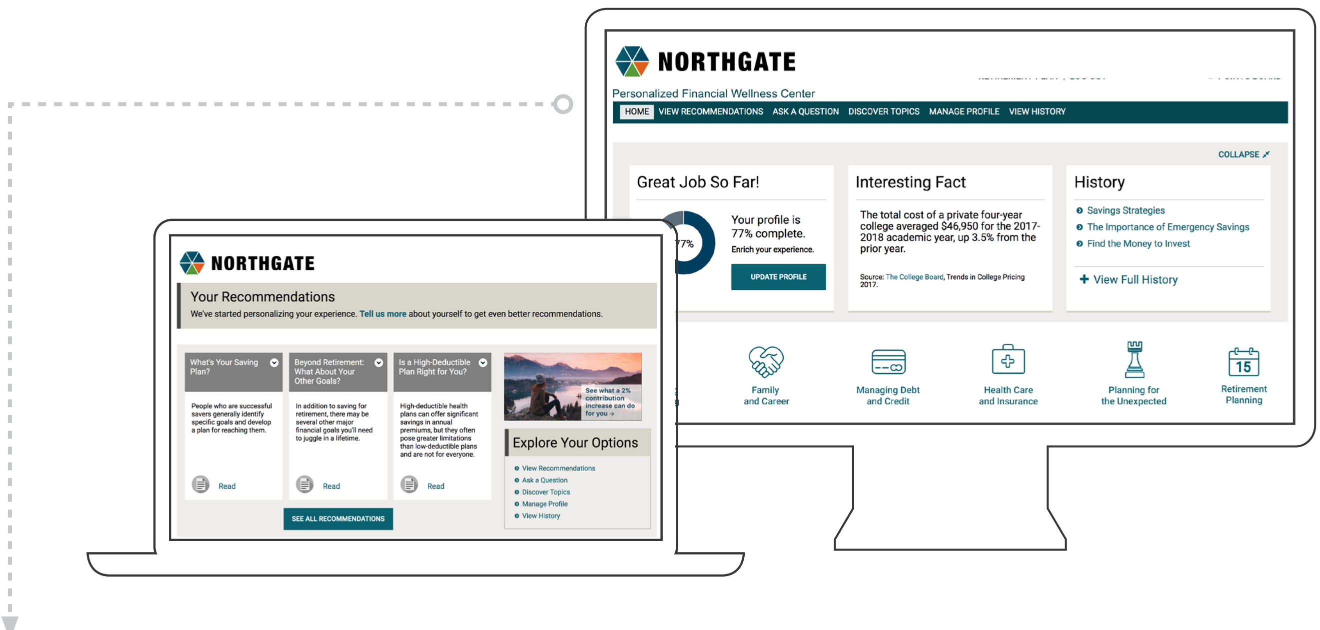
When investors have personalized, relevant data and easy-to-use tools on hand, they are more motivated and better equipped to make meaningful financial decisions. The Center has the content and customizable solutions to help investors take positive steps forward on their journey.

Personalizing the Financial Wellness Center experience

The Center's robust, configurable solutions are made possible by a combination of our agile development capabilities and a vast financial library. The Center has more than 3,000 articles and hundreds of tools, videos, charts, and calculators for shaping compelling user experiences across virtually any financial topic, life stage, or learning style.

Personalized landing page

The Center offers multiple flexible options through which to personalize the user experience, such as web services, personas, surveys, and quizzes. A brief survey captures investor-specific input enabling an individualized user experience with highly relevant educational content and tools, as well as featured content selected by you.



The "personality traits" approach

The Center allows each investor to select a pre-defined persona or create a customized persona. As an investor logs into the site, the investor's unique attributes launch a persona-based landing page featuring life-stage-specific articles, charts, videos, and calculators.

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Comprehensive reporting suite

The Center offers a one-stop, web-based suite of reports that provide you with real-time access, detailed analytics, and actionable insights. Gain insight into the areas in which investors are spending their time – and the results from their quiz and curriculum activities. Enrich your decision-making process and maximize your time with our reporting suite:

Report Rollup

Summarizes the key quiz and education findings and benchmarks

Usage

See which investors are earning the most points, the topics they are interested in, and overall engagement with the site

Analytics

Know what content is getting the most views, the Ask questions that are most frequently requested, and how engaged users are with the curriculum

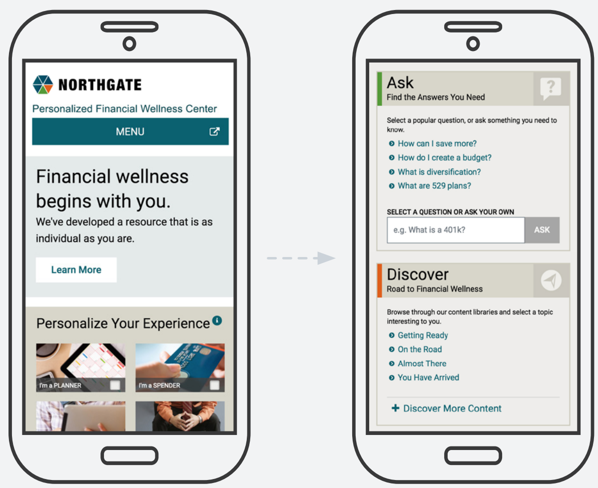
Calls to Action

Gain insight into how well you are driving investors to the next best action

Mobile-friendly solutions

Being on the move should not be a roadblock to financial fitness. At any time, on any device, users can connect to their account, bring up their personalized dashboard, and access the Center's educational content and resources.

Designed to be compliant with ADA 2.0 standards, the Center supports ADA requirements ensuring the Center is accessible to everyone.



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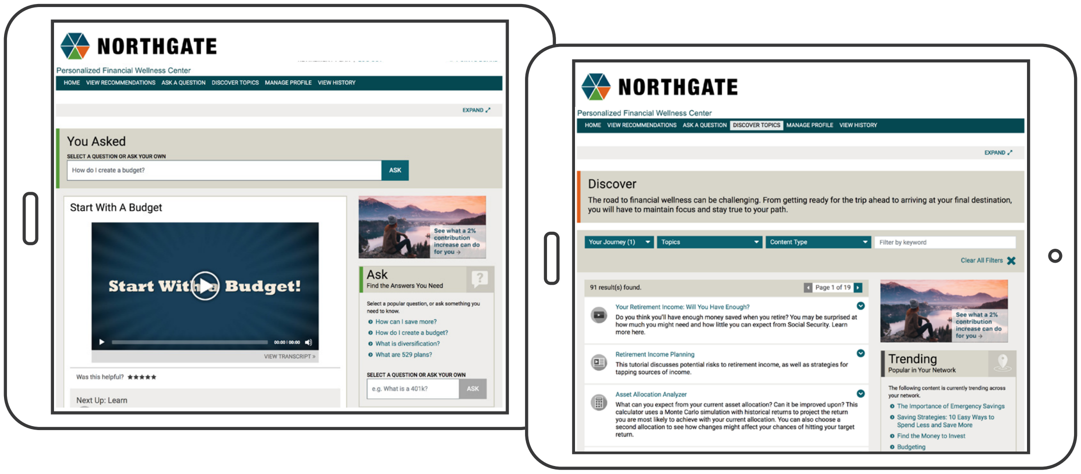
Ask and Discover modules

Different configurable search and learning modules were created to suit different learning styles. The Ask module allows users to initiate a question and see recommendations from a selection of frequently asked questions and responses. The Discover module is built for users who prefer to search content using traditional navigation methods.



Integration across your solutions

The Center seamlessly integrates with our other data-driven products and solutions. Take advantage of this feature to drive even greater efficiencies, increased engagement and client loyalty, and improved client outcomes. Integration opportunities include:

- Campaign Manager: deliver profile-driven emails to investors and drive them to the Center to improve their outcome. For example, send an email to investors on the importance of retirement planning and drive them to the Center with a content item describing the importance of contributing to an IRA and a call to action to make a change.
- Digital Newsletter: drive return visits and increase engagement with a monthly newsletter that provides targeted calls to action that link back to the Financial Wellness Center.
- Plan Health Reports: using the KPIs built into the Plan Health Report, send targeted emails to investors through Campaign Manager. Embedded calls to action drive investors to the Center to help improve outcomes. Measure the improvement in those KPIs next quarter.

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