



# The NEXT Platform

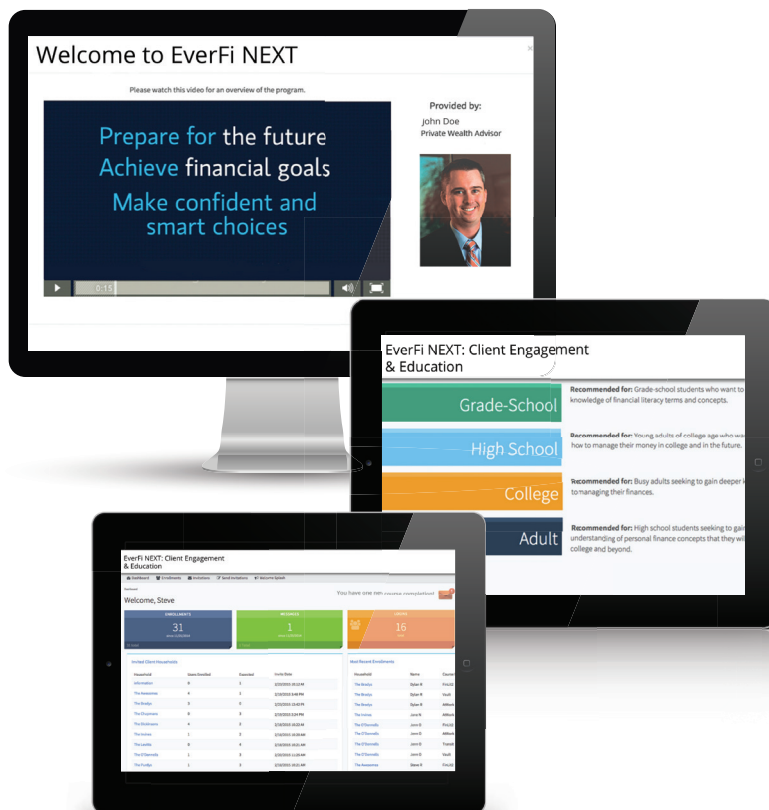
## Private Wealth Management Engagement & Education

There is a crucial need for financial institutions to deepen relationships with clients and their families; to hold onto business when wealth transfers generations, and to be poised to gain new business opportunities with heirs who leave competing organizations. *EverFi NEXT* was built to help wealth advisors:

- Mitigate the **next generation transfer of wealth**.
- Create meaningful **client engagement** opportunities at scale.
- Provide additional tools for **client acquisition**.
- Position your organization as a **trusted source of financial education** for all ages.

# Building Loyalty with Future Generations

*EverFi NEXT* allows advisors to deliver customized financial education to their clients, track and monitor engagement and usage, and initiate important dialogue with clients' families. Our platform fosters stronger relationships between the next generation, your financial institution, and its advisors.



# \$41 trillion

will transfer from Baby Boomers to their heirs over the next four decades

- Boston College Social Welfare Research Institute

“Often when parents pass, children take their relationships elsewhere. We’re trying to bridge that gap as well as try to be the provider of choice not just for the patriarch or matriarch but for the entire family. It’s easier to keep a client than to find a new one.”

- Judy Spalthoff, Executive Director, UBS Private Wealth Management, FUNDfire, February 2, 2015

# 90%

of prospective heirs change wealth advisors once they receive their inheritance

- Pershing 2011 Study

# Your Solution: Customized Financial Education

- Each advisor has a **private-branded platform** with their photo and other biographical information to connect clients and their families with financial education.
- **Custom-built web interface** where clients access learning modules and advisors track usage, progress, and receive messages from clients.
- **Multiple touch points** within the platform to create communication between the advisors and their clients.
- **Expert implementation, training, and outreach support** to ensure successful adoption and usage.
- **User data and analytics** that can be shared between corporate leadership, advisors and various internal stakeholders.

“Once children become confident and comfortable in using wealth management services with certain private banks or wealth management firms, they are unlikely to switch.”

- Roselyn Lekdee, WealthInsight Analyst  
FUNDFire, February 2, 2015

# For the Entire Family

EverFi NEXT provides an engaging, dynamic education experience that brings financial concepts to life for learners of all ages.

## Vault UNDERSTANDING MONEY Grade School



## EverFi FINANCIAL LITERACY High School



## Transit FINANCIAL WELLNESS College Students



## @Work FINANCIAL EDUCATION WORKING FOR YOU Adults



## About EverFi

EverFi, Inc. is a leading education technology company with more than 10 million people reached on its learning platforms. With innovative investors like Jeff Bezos, Founder of Amazon and Eric Schmidt, Chairman of Google, and over 1,000 partners in the corporate, non-profit, and education space, EverFi provides innovative, customized online education tools that will empower your next generation of clients.

Some of EverFi's key financial services partners include:



Morgan Stanley