

EVERFI

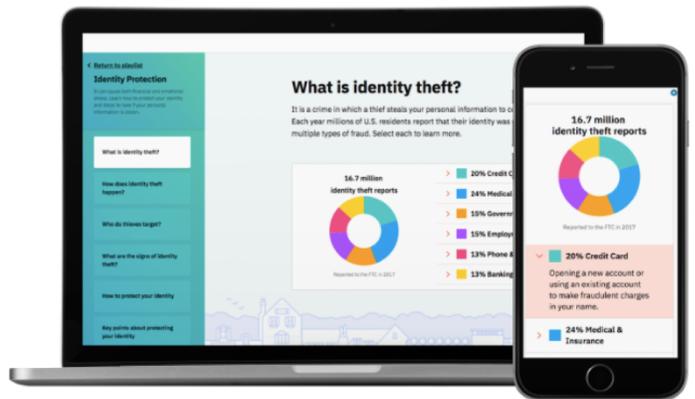
# Personalized Financial Education For Your Consumers

Provide personalized and just-in-time financial education to your consumers and employees with EVERFI Achieve, a new mobile-first financial education solution.

## BUILD FINANCIAL CAPABILITY

Today, your consumers are likely struggling with their finances. From saving for emergencies, to paying for their children's education, to preparing for retirement, consumers are struggling to navigate many aspects of their financial lives. Four in ten US adults are not able to cover a \$400 emergency expense. Less than 40% of adults believe they are on track for retirement. And 24% of adults have nothing saved for retirement at all.<sup>1</sup>

No one is better suited than your institution to provide your consumers with the tools and knowledge they need to secure healthy financial futures for themselves and their families. With EVERFI Achieve, your institution will be able to drive measurable change in the financial capability of your consumers through providing personalized education at scale.

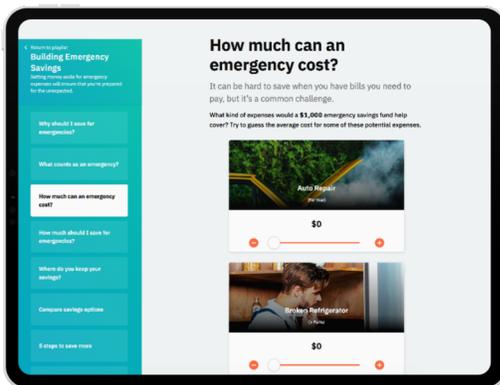


Identity Theft Learning Sequence

## CUSTOMIZED, MOBILE-FIRST SOLUTION

EVERFI Achieve is an interactive, mobile-first financial education solution that allows your institution to deliver personalized financial education to your consumers wherever they are. EVERFI Achieve is fully customized to your institution's brand and values, allowing you to embed custom content & calls-to-action in the learning experience.

The EVERFI Achieve data platform provides your institution with powerful insights into the financial struggles, goals & priorities of your consumers allowing you to provide them with even more value and personalized help.



Emergency Savings Learning Sequence

1. Report on the Economic Well-Being of U.S. Households (SHED), Federal Reserve, May 2018

## LEARNING EXPERIENCE

EVERFI Achieve provides an engaging learning experience through a series of interactive learning sequences organized into playlists designed to deliver actionable financial education for your consumers.

Learners can take a brief survey at the beginning of the learning experience to receive a personalized playlist of sequences relevant to their financial goals. Each learning sequence covers a single topic (i.e. Paying for College or Planning for Retirement) through a series of micro learning moments designed to provide targeted answers to learner's questions.

## CONTENT LIBRARY

Below are the five standard playlists made up of 30 learning sequences. Each learning sequence is 3-6 minutes in length, ADA compliant, and device-agnostic.

### Banking Basics

Checking Accounts, Car Loans, Preventing Overdraft Fees, Credit Cards, Mobile and Online Banking

### Building Financial Capability

Identity Protection, Credit Scores & Reports, Creating a Budget, Debt Management, Family Conversations About Money, Taxes - The Basics

### Retirement Planning

Planning for Retirement, 401k Plans, When to Collect Social Security, FIRE Lifestyle, IRAs

### Homeownership

Considering Homeownership, Mortgages, Reverse Mortgages, Buying a Home, Mortgage Relief, Investment Properties

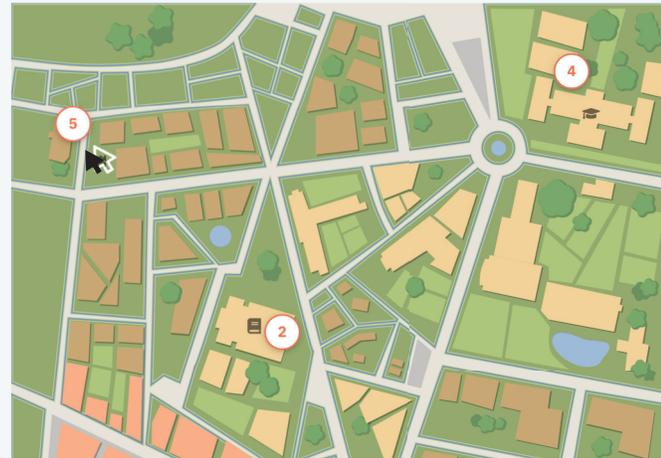
### Saving and Investing in Your Future

Paying for College, Building, Emergency Savings, Shopping for Insurance, Health Savings Accounts (HSA), Savings Accounts, Certificates of Deposits (CDs), 529 Plans - Saving for College

## What college costs should you consider?

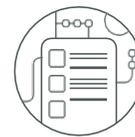
Besides tuition and housing, the average family spends an additional \$1,700 - \$3,300 per semester on other college costs.

Select each area on the campus map to learn about college costs you may need to consider.



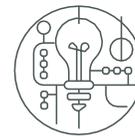
Paying For College Learning Sequence

## PLATFORM FEATURES



### Mobile-First

Mobile-first design allows you to reach consumers where they are and gives them flexibility to engage with content on-the-go



### Highly Customizable

Fully white-labeled learning platform and customization points allow you provide a relevant and branded experience to your consumers



### Interactive

Best-in-class, personalized learning experience for learners with engaging content and interactive exercises to allow them to practice what they learn



### Measurable

Comprehensive data reporting on learner activity allowing you to gain valuable insights into the priorities and interests of your consumers

[Learn More at EVERFI.COM/ACHIEVE](https://www.everfi.com/achieve)

EVERFI

EVERFI, Inc. is the leading education technology company that provides real-world education to learners of all ages through innovative and scalable digital learning. Some of America's leading CEOs and venture capital firms are EVERFI investors including Amazon founder and CEO Jeff Bezos, Google Chairman Eric Schmidt, Twitter founder Evan Williams, TPG Growth, The Rise Fund, Advance Publications, Rethink Education, and Rethink Impact.

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