

Amplify Your Community Impact Through Education



EVERFI®

What We Do

EVERFI helps purpose-driven companies achieve their social impact and business goals, drive direct impact in their communities, and forge meaningful connections to their brand by developing and deploying world-class educational content and experiences that prepare individuals for life's most crucial challenges.

Why?

Because we believe that everyone deserves the knowledge and confidence to build financial wellness and achieve positive health outcomes, regardless of their gender, race, or socioeconomic status. When purpose-driven companies and organizations drive enduring impact at scale on the issues that matter most to their brands, they improve lives, fuel change, and achieve stronger business results.

WHAT SETS US APART

Trust at the Core

We've earned the trust of an unmatched network of 25,000 K-12 schools, so our customers can reach millions of students. We earn the trust of learners through engaging, effective curricula. We earn the trust of our customers by delivering meaningful impact to their business and the communities they care about and by providing detailed reporting to help them tell a powerful impact story.

EVERFI At-a-Glance



17+

years of delivering and capturing the impact of community engagement



73+

million learners reached



1,000+

global strategic partners



1 in 4

public schools in the U.S. use EVERFI (23,000 active K-12 schools in 2023-24)



300+

employees to support our partners' initiatives around the world



Our Solution

Empowering Communities at Scale



Our Focus Areas

K-12 Courses

Financial Wellness

Drive financial capability to empower learners of all ages and build resilient communities.

- Personal Finance
- Early Financial Literacy
- Safe Digital Banking
- Financing Higher Education
- Saving Money for the Future
- Crypto Foundations
- Economics
- Entrepreneurship
- Understanding Taxes
- Mind and Money Connection
- Credit Fundamentals

STEM & Career Readiness

Power college and career readiness among learners of all ages to achieve personal goals in the real-world.

- College & Career Readiness
- Accounting Careers
- STEM Career Exploration
- Data Science

Health & Mental Wellness

Encourage comprehensive health and well-being by inspiring students of all ages to make healthy lifestyle choices for their future wellness.

- Mental Wellness
- Prescription Drug Safety
- Alcohol Education
- Nutrition & Healthy Living
- Compassion and Empathy
- Digital Wellness & Safety

Adult Courses

Workplace Training

Build a stronger workplace culture through impactful and compliant online training.

- Preventing Harassment and Discrimination
- Diversity, Equity, and Inclusion
- Leadership and Management
- Ethics and Compliance
- Workplace Safety and Health
- Data and Cybersecurity

Consumer Financial Education

Digital content and live workshops on 100+ topics to build consumers' financial capability, which includes:

- Saving and Budgeting
- Debt Management
- Mortgages & Home Ownership
- Credit Scores & Reports
- Planning for Financial Emergencies
- Small Business Banking
- Investor Education
- Healthcare Finances
- Preparing for Retirement
- Financing Higher Education
- Financial Caregiving



+



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CALCULATE

DIGITAL LEARNING EXPERIENCE: SCHOOLS

Industry-Recognized Course Content



This recognizes EVERFI's commitment to developing K-12 content and learning experiences based on learning science and empirical research.



This recognizes EVERFI's commitment to supporting critical-digital-age learning skills and knowledge.



This recognizes EVERFI's commitment to the mission of advancing financial literacy and effective financial education through collaboration and collective contributors.

Our Partner Network

EVERFI helps brands of all sizes achieve their social impact and business goals by deploying trusted, world-class educational content that prepares people for life's most important challenges.





McKinsey
& Company



SPACEX



patagonia

tapestry

COACH | kate spade | STUART WEITZMAN

HCA
Healthcare®

Google

amazon

truth
initiative®
INSPIRING LIVES
FREE FROM SMOKING,
VAPING & NICOTINE

BCG

GUILD

leidos



CardinalHealth



Dear Friends,

Since its founding, EVERFI has envisioned building a future where every student, regardless of their zip code, has access to life-changing education. Our mission began with delivering financial literacy to underserved communities, but over time our focus expanded as we recognized the need to equip students with essential life skills in areas like health and mental wellness, character education, and career readiness. By partnering with businesses that understand the value of building thriving communities, we've been able to amplify this mission, delivering measurable impact while helping companies achieve both their community engagement and business goals.

EVERFI is uniquely positioned to deliver exclusive access to K-12 schools across the country. This access enables us to provide students with critical education while supporting businesses in their desire to create lasting, meaningful social change. Our partnerships go beyond philanthropy—they enable companies to engage deeply with the next generation, ensuring that students are equipped with the skills needed for success in life and work.

Today, more than ever, corporations play a pivotal role in addressing society's most pressing challenges. As leaders, you have the power to impact not just your customers and employees but the communities you serve. EVERFI understands this responsibility, and we've helped our partners take action, delivering education that changes lives while driving business value. Our work together shows that the right kind of impact—one that fosters both community engagement and business success—is possible, measurable, and transformative.

A handwritten signature in white ink, reading "Ray Martinez". The signature is fluid and cursive, with the first name "Ray" being more prominent.

Ray Martinez, Co-CEO and Co-Founder

A handwritten signature in white ink, reading "Ellen Patterson". The signature is fluid and cursive, with the last name "Patterson" being more prominent.

Ellen Patterson, Co-CEO and President, EVERFI

Our Leadership Team



Ellen Patterson
Co-CEO and President



Ray Martinez
Co-CEO and Co-Founder



Alice Lee
Head of Customer Experience



Jenny Hoffman
Head of Marketing



Bria Barker
Head of Sales



Dan Grace
Head of Product



Justin Windholtz
Head of Engineering



Anupam Kumar
Head of Operational Excellence &
Delivery



Elizabeth Bille
Senior Vice President and
General Manager, Workplace
Culture Network

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