



TD Bank AND Everfi

Scaling Digital Financial Education to Better Serve Community Needs

TD Bank Group is the sixth-largest bank in North America by assets and serves over 27.5 million customers. It ranks among the world's leading online financial services firms, with more than 17 million active online and mobile banking customers. As part of its commitment to investing in the future, TD Bank provides free financial education resources to the public.

CHALLENGE: Expanding Beyond In-Person Presentations

TD Bank has long recognized the importance of financial education to empower its customers and communities. Yet, the bank's financial education efforts were mostly focused on in-person, volunteer-led presentations. While this approach was effective in reaching local communities, it was limited in scalability and accessibility. TD Bank sought a digital solution that would complement and expand on its in-person efforts.

The bank recognized the need to develop a digital platform that could extend the reach of its financial education initiatives and provide customers with mobile, on-demand content and learning.



We had our own proprietary financial education presentations that we were giving in-person to the public. We were looking for something to supplement our financial education space online.

Mandy Kelso
Head of Financial Education
TD Bank

SOLUTION: The TD Bank Learning Center, Powered by Everfi Achieve®

TD Bank selected Everfi Achieve to power the TD Bank Learning Center. Everfi Achieve is an interactive, mobile-first financial education platform that delivers white-labeled, personalized financial education to consumers wherever they are. Achieve provides an engaging learning experience through a series of interactive learning sequences organized into playlists, all designed to deliver actionable financial education for 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 ranging from saving for emergencies, to paying for their children's education, to preparing for retirement. Content is centered around micro learning moments designed to provide targeted answers to learners' questions.

Achieve is also fully customizable, allowing banks and other institutions to embed custom content, offers, and calls-to-action within the learning experience. In addition, Achieve offers powerful insights through rich data that highlight the goals and priorities of users, so banks can provide even more value and personalized help.

IMPACT: Timely and Relevant Financial Education

Today, the TD Bank Learning Center is a resounding success, reaching over 90,000 users in 2024 alone. The site is highly flexible and scalable, allowing anyone to access its personalized content for free.

“The modules aren’t static, they’re constantly updated with topical, current content,” explained Kelso. “This was especially important during the pandemic, when in-person presentations weren’t feasible. Usage skyrocketed because folks were worried about their finances, applying for small business loans, and looking for ways to save money. We saw a huge increase in usage during the pandemic, and we’ve maintained that momentum since.”

The TD Bank Learning Center is highly integrated with the bank's business, so TD Bank can deliver timely and relevant financial education to its audience that ties back to its business.

“I love that the platform allows for custom moments and learning that links to specific TD Bank resources,” said Kelso. “For example, let’s say we’re launching a new checking account feature that helps customers avoid overdraft fees. We can offer a complementary module that explains the importance of avoiding these types of fees along with additional resources and offers.”

The site’s mobile-first design and multilingual offerings have been particularly valuable in serving a diverse community and customer base, allowing the bank to support a much wider audience.

“We were at an event and a group of teachers asked if we had any Spanish-language content,” said Kelso. “I pulled out my phone and showed them a QR code that linked to the TD Bank Learning Center with all 50 modules available in Spanish. They were so excited because historically there’s been a real lack of quality, accessible financial education content available to that community.”

Looking ahead, TD Bank is committed to continuously expanding the reach and impact of the site by expanding the library of educational modules, exploring new content areas, and further integrating the platform into the bank's various customer touchpoints and business lines.

With the Everfi Achieve platform, TD Bank can empower even more individuals and communities with the financial knowledge and tools they need to improve their overall financial well-being.



Everfi Achieve lets us focus on our customers and community, to be responsive and meet learners where they are. We want to make sure we give the best guidance on finance at the exact moment people need it. Everfi helps us make that happen. Everfi Achieve is a fantastic tool to expand our community impact.

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Head of Financial Education
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Everfi Achieve is just one of Everfi's broad offerings of [free online education programs](#) for adults and K-12 students. Through the support of its corporate sponsors, Everfi has been offering financial literacy education since 2008.

Interested in gaining a tangible business edge through personal financial education?

Explore Everfi's innovative financial education solutions [here](#).