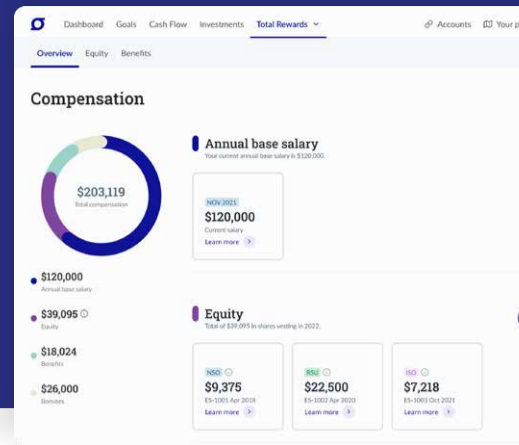


Meet Origin, the modern financial wellness benefit for your workforce

Origin is a financial wellness benefit that combines cutting-edge technology with unlimited 1:1 financial guidance with Certified Financial Planners—helping employees make the most of their compensation, benefits, and personal finances.



Why financial wellness?

Talent is asking for this benefit: 93% of employees want their employer to offer access to financial planning and advisory services—but only 28% do.

Employees are confused and stressed over finances: Finances are the #1 source of employee stress, and financially-stressed employees are 2x more likely to leave their employer.

Limited access: Wealth management is geared towards high-net-worth individuals, and is out of reach to the average employee

Sources: The State of Employee Financial Health and Wealth, Origin, 2021; PWC 2021 Employee financial wellness survey



Explore Origin Features



- ✓ Unlimited 1-on-1 meetings with a Certified Financial Planner (or local equivalent internationally)
- ✓ Personalized financial roadmap with detailed, actionable recommendations
- ✓ The largest global network of financial planners
- ✓ One platform to view and track net worth, set and manage goals, and automate investments
- ✓ Total rewards integration to help employees make informed decisions
- ✓ Customizable financial education workshops designed for your employees' needs

How Origin works for your People team

- ✓ **Gain and retain talent**
Leading companies use Origin to strengthen relationships with current employees by addressing their financial needs.
- ✓ **Demystify equity**
Origin answers tough questions on how equity works and offers guidance to your employees around liquidity events and taxes.
- ✓ **Maximize total rewards**
Help employees connect the dots between personal finances and total compensation.
- ✓ **Increase benefit utilization**
Helps employees make decisions around their benefits by explaining health plan costs, HSAs, FSAs, and retirement strategies.

The Origin difference

<p>High engagement</p> <p>31% of employees use Origin</p>	<p>Global support</p> <p>250+ Financial planners across 35+ countries</p>	<p>Employee experience</p> <p>84NPS Employees love Origin</p>	<p>Diverse network</p> <p>5x More diverse than the general CFP population</p>
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How Origin works for your People team



Origin is a true partner to the people team at Udemy. Origin acts as the single place for our employees to manage anything with a dollar sign.”
Emily Duff | Manager, Global Benefits



Origin came up as a leading financial planning platform and has now been a reliable partner for almost a full year. We launched Origin to our team members in January 2020 and have seen immediate adoption.”
Laura Rondanin | Global Benefits & Perks Manager

Are you interested in Origin for your company?
Visit us at useorigin.com or send us an email at sales@useorigin.com