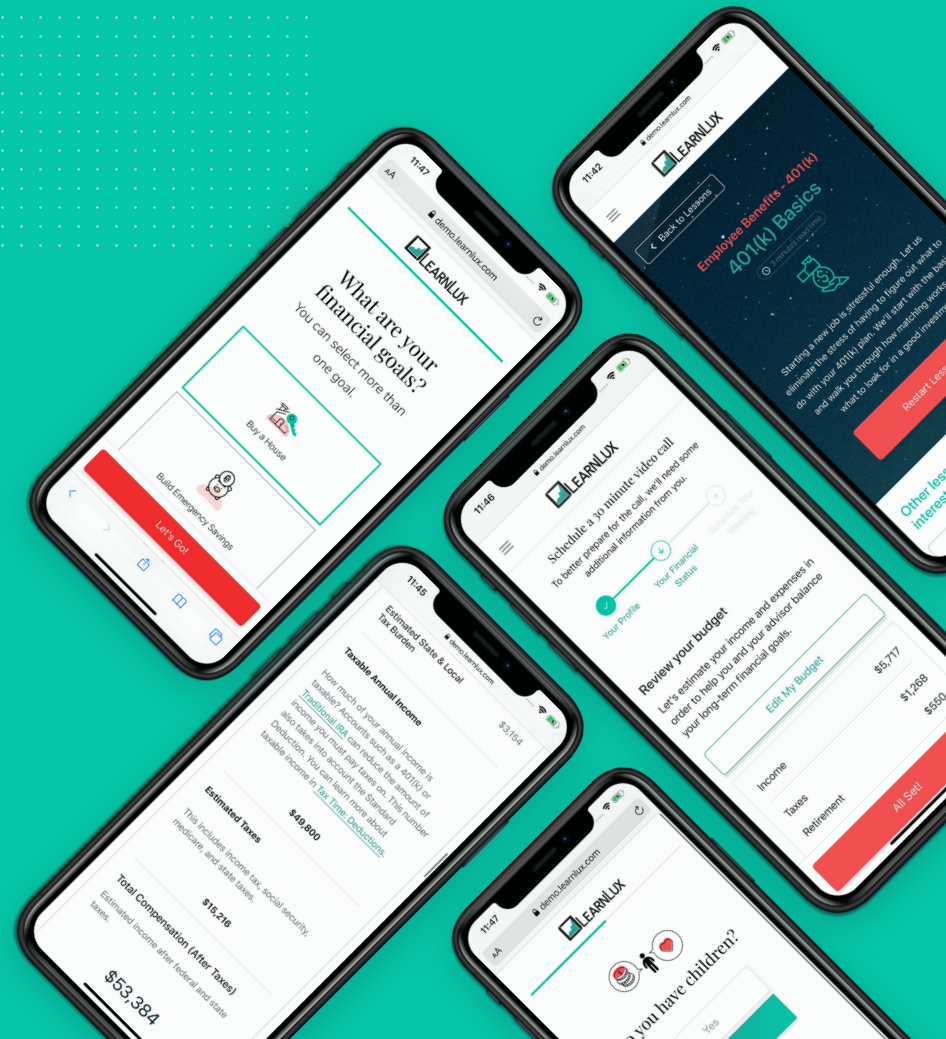




# Financial Wellbeing

Trusted financial wellbeing for your entire workforce.

Prepared April 2022



# About LearnLux

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LearnLux is a best of breed financial wellbeing solution that is trusted among top employers



Industry leader in providing holistic financial wellbeing programs



Technology company backed by Marc Benioff (CEO of Salesforce), Biz Stone (Co-founder of Twitter), and Ashton Kutcher



Experienced team of technology, finance, and wellbeing experts



Selected by the Wellness Council of America (WELCOA) as their only trusted financial wellbeing partner



## OUR MISSION

Democratize access to  
fiduciary financial guidance  
for **everyone.**

## OUR PROMISE

We guarantee security, privacy, and a judgment-free place to talk about money.

We never:

- ⊗ *Sell products or data*
- ⊗ *Make referral commissions*
- ⊗ *Surprise you with hidden fees*



## OUR SOLUTION

LearnLux provides the **most accessible and equitable** financial wellbeing program to empower anyone to have access to **fiduciary financial guidance.**

# Democratizing access to fiduciary financial guidance



## Independent

Always aligned with member's financial needs - no commissions, no fees. Ever.



## Customizable

Customized for you, personalized for your members.

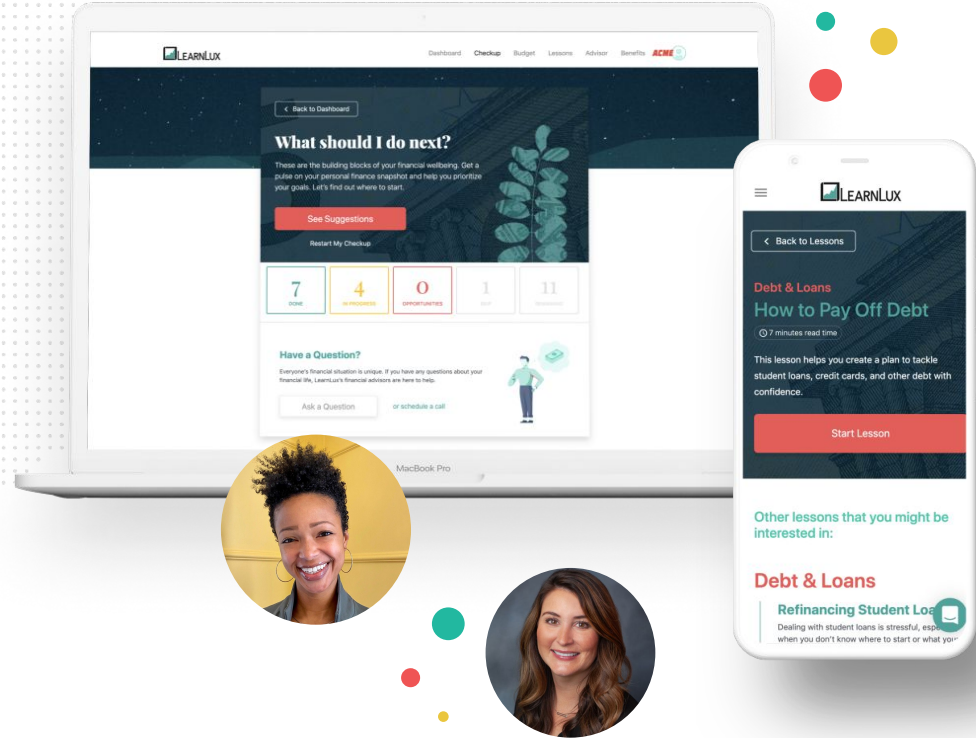


## Holistic

Resources to meet the needs of diverse populations in all phases of life.

# The LearnLux Program

Digital + Human



# One-on-One Guidance from Certified Financial Planner™ Professionals



- ✓ Highest certification in financial planning
- ✓ Ethical obligation to provide fiduciary financial guidance
- ✓ Employed directly by LearnLux
- ✓ Judgment-free

# LearnLux is for everyone

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Powerful yet practical education that's  
100% jargon free

- Budgeting
  - Credit
  - Debt & Loans
  - Taxes
  - Insurance
  - Retirement
  - Emergency Savings
  - Stock Options - RSUs, ISOs, NSOs, ESPP, ESOP & more
  - Home Owning & Renting
  - Estate Planning
  - College Savings
  - Investing & Financial Planning
  - Employee Benefits - Health
  - Employee Benefits - Finances
- + *Custom lessons created to align with each partner's organizational goals*

# Our Service Offering

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Best-in-class financial wellbeing that helps your whole team feel great about their money.



# Our Partners



## LearnLux



White-glove customer support includes toolkits, ongoing engagement, campaigns & custom reporting



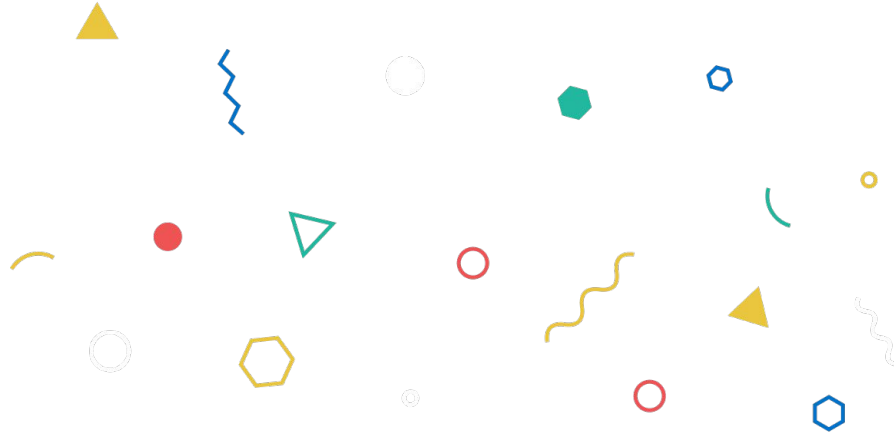
Setup and launch is lightning fast, with no sensitive data needed



Our Certified Financial Planners and content team create custom lessons



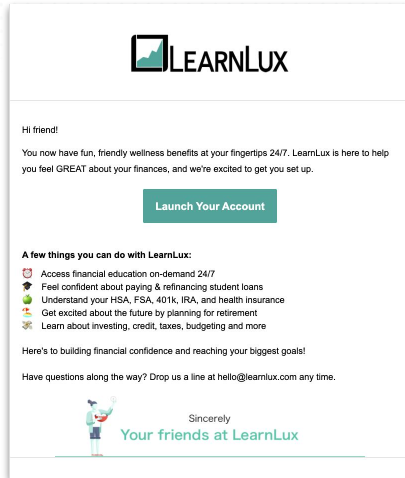
Budget-friendly pricing scales for organizations of all sizes



# Custom Communications Toolkit

LearnLux will provide Custom, Co-branded, Electronic Communication Toolkit to use throughout the year to promote Financial Wellbeing.

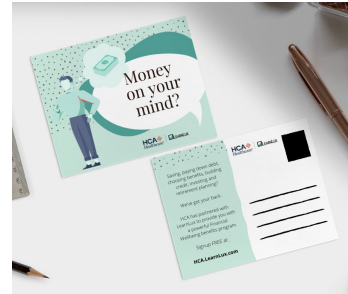
## Email Templates



## Engagement Challenges & Incentives



## Postcards & Handouts



## Intranet Posts & Digital Signage





# Simple, scalable pricing. No hidden fees, ever.

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LearnLux doesn't charge any additional fees or earn any commissions on selling financial products or user data.

## Program Offering



Access to LearnLux's Certified Financial Planners via video call, phone call, email, and chat



Custom information in core custom lessons



Custom webinars with LearnLux Planners



LearnLux-sponsored incentive programs each year



Custom reporting & communication toolkits

# Simple, **scalable** pricing

Choose the best plan for your workforce's unique needs.

## Advanced

\$18,000

Annually

- Co-branded digital platform with the financial checkup, budget, goals, and interactive lessons
- **Unlimited** access to CFP professionals via video call, phone call, email, and chat, including access to Spanish-speaking CFPs
- Two shared webinars per month
- Quarterly reporting

Based on 275 US employees

## Premier

\$24,000

Annually

- **Everything included in Advanced, plus:**
- Up to 6 custom lessons on all benefits offerings, including financial and health benefits
- Custom benefits portal
- Quarterly private webinars

Based on 275 US employees

We look forward to working with you.  
Don't hesitate to reach out if you have  
any questions.

An abstract geometric pattern on a dark blue background. The pattern consists of various shapes and lines in white, yellow, red, green, and blue. These include circles, triangles, hexagons, octagons, wavy lines, and a zigzag line. The shapes are scattered across the frame, creating a dynamic and modern aesthetic.