

Improve your employees' futures using InvestCloud's digital financial wellness solution

Account Linking & Aggregation
Coaching & Advice
Community
Employer Portal

Goals-Based Planning
Leveling & Gamification
Life Scores & Guidance
Holistic Wellbeing

InvestCloud Pink makes it easy to plan, track, and meet goals on the journey to a healthy financial future.

Built simply, for everyone, icPink is customizable for large businesses who want to offer powerful tools to their employees, this platform allows anyone to store, organize and share important documents, track a multitude of assets, use advanced goals based planning tools, and receive life scores and guidance about their financial wellbeing. Through playful UX and thoughtful behavioral science, Pink ensures confidence is built at the same time financial wellness is achieved.

Employees are four times as likely to be distracted by finances at work.*

InvestCloud Pink provides employees with an intuitive and immersive experience to keep them engaged in improving their financial well-being. Pink makes setting goals approachable and easy to grasp - from tracking finances, to creating a clear life plan for the future - all while receiving life scores and guidance through valuable and actionable coaching. Pink empowers employers to promote financial wellness for their employees at a time when over **63% of employees say their financial stress has increased since the start of the pandemic.***

Financial Wellness - brought to life by design and behavioral science



Ease of Use

Never be frustrated when using our intuitive UI, with helpful hints peppered in for your convenience. Anywhere. On any device.

Improvement

Receive suggestions on how best to improve your financial wellness and outlook.

See Your Future

Easily understand the impact your goals will have on your financial future and track your likelihood to retire on time!

Encouragement

Never fall behind with updates provided at every step of the way and the option to leverage professional coaching and/or advice from our partners at Ameriprise Financial.

*PwC's 2021 Employee Financial Wellness Survey

ACCOUNT LINKING & AGGREGATION

- Private Asset & Liability Tracking
- External Account Aggregation
- Asset Sharing
- Financial Roadmap
- Digital Advice Robo
- Transactions & Analysis
- Budgeting
- Document Management
- Document Roadmap
- Document Sharing
- Document Tracking
- Document Watermarking
- Document Vault

COACHING & ADVICE

- Frictionless Coach Matching
- Planning Intelligence
- Meeting Briefing
- Video Chat

COMMUNITY

- Community Management
- Community Challenges
- Peer Benchmarking
- Social Integration
- Social Sharing
- Push Message Notification / Alerts

EMPLOYER PORTAL

- Employee Intelligence
- Engagement Tracking
- Financial Wellness Score
- Usage Analytics
- Holistic Wealth Reporting
- ActivityTech
- CanvasTech

GOALS-BASED PLANNING

- What-if Scenario Analysis
- Future Planning
- Personal Transaction Analysis
- Personal Cash Flow Projection

LEVELING & GAMIFICATION

- Gaming Theory
- Decision Theory
- Behavioral Science
- Frictionless Onboarding

LIFE SCORES & GUIDANCE

- Financial Health Scores
- Multi-Question / Multi-Answer (MQMA)
- Peer Comparisons

HOLISTIC WELLBEING

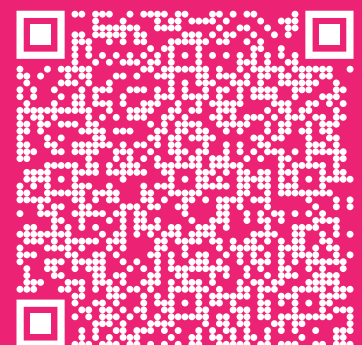
- Stress Management
- Personalized Content
- Wellbeing Challenges
- Physical, Mental, & Social Nourishment

InvestCloud Pink comes with the **My Confidence** app, which combines quantitative and qualitative analysis of sentiment, bridging the gap between financial and emotional intelligence.

Also included is the **My Wellbeing** app; complete with tools to empower your employees to nourish their body and mind, with encouragement to become more active at a time when they are **twice as likely to avoid addressing a medical or mental issue due to cost.***

Learn more!

Scan the QR code below!



ABOUT INVESTCLOUD INC.

InvestCloud is a global company specializing in digital platforms that enable the development of financial solutions, pre-integrated into the Cloud. The company offers on-demand client experiences and intuitive operations solutions using an ever-expanding library of modular apps, resulting in powerful products. Headquartered in Los Angeles, InvestCloud has over 20 global offices including New York, London, Geneva, Singapore and Sydney, supporting trillions in assets across hundreds of diverse clients – from the largest banks in the world to wealth managers, asset managers and asset services companies.

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