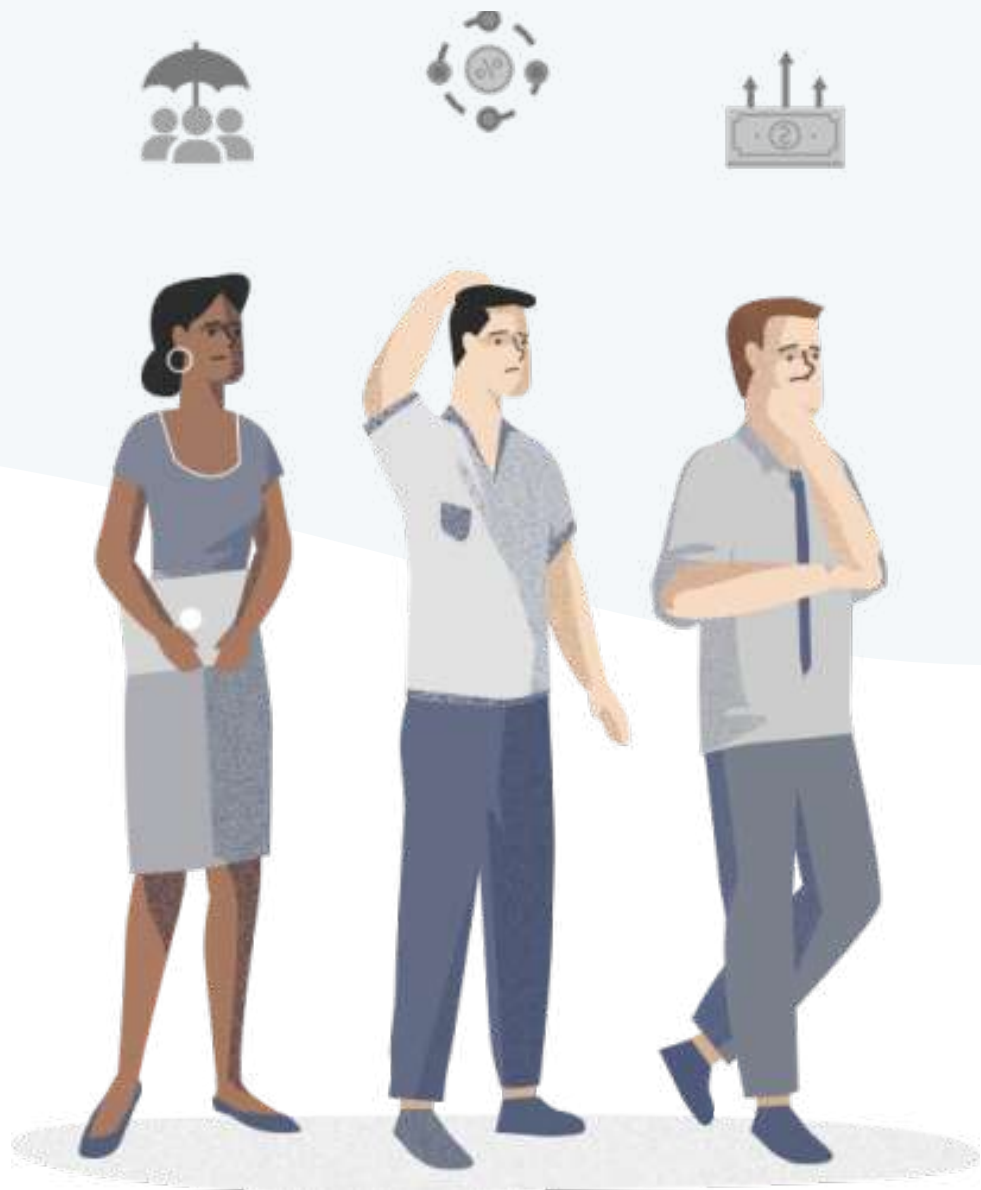


Meet Origin, the modern financial wellness benefit for employees

Origin is the leading financial wellness platform that helps your people reach their goals and plan for the future.

The problem

Finances are the top cause of employee stress – above job, health, and relationship stress combined.



60% indicate that money is their #1 of source of stress

Financially stressed employees cost \$1,900 annually in the form of lost productivity and turnover.

4x as likely to be depressed

Financially stressed employees are 190% more likely to be depressed than the general public.

2x as likely to leave

Financially stressed employees are more than twice as likely to leave the company.

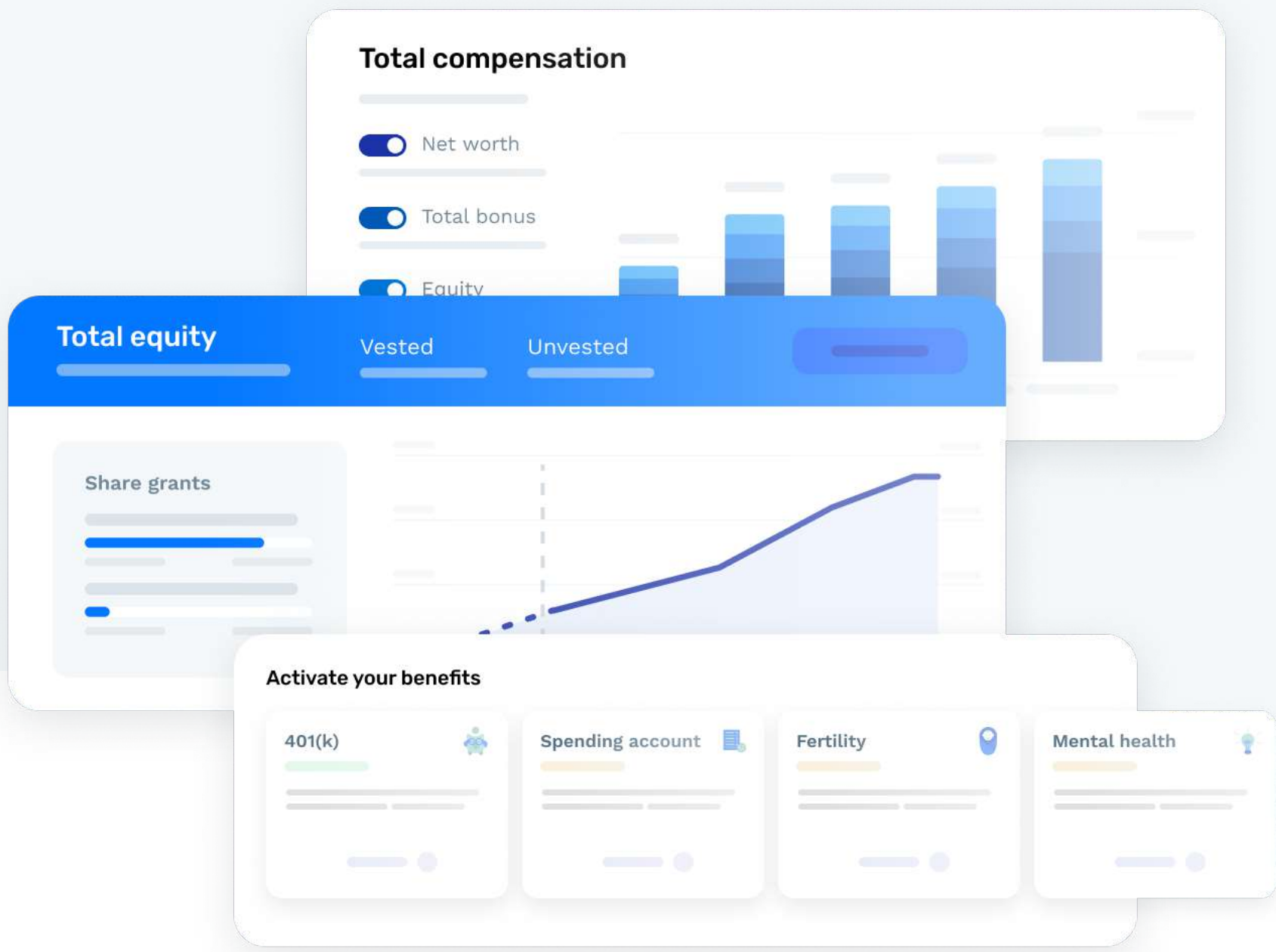
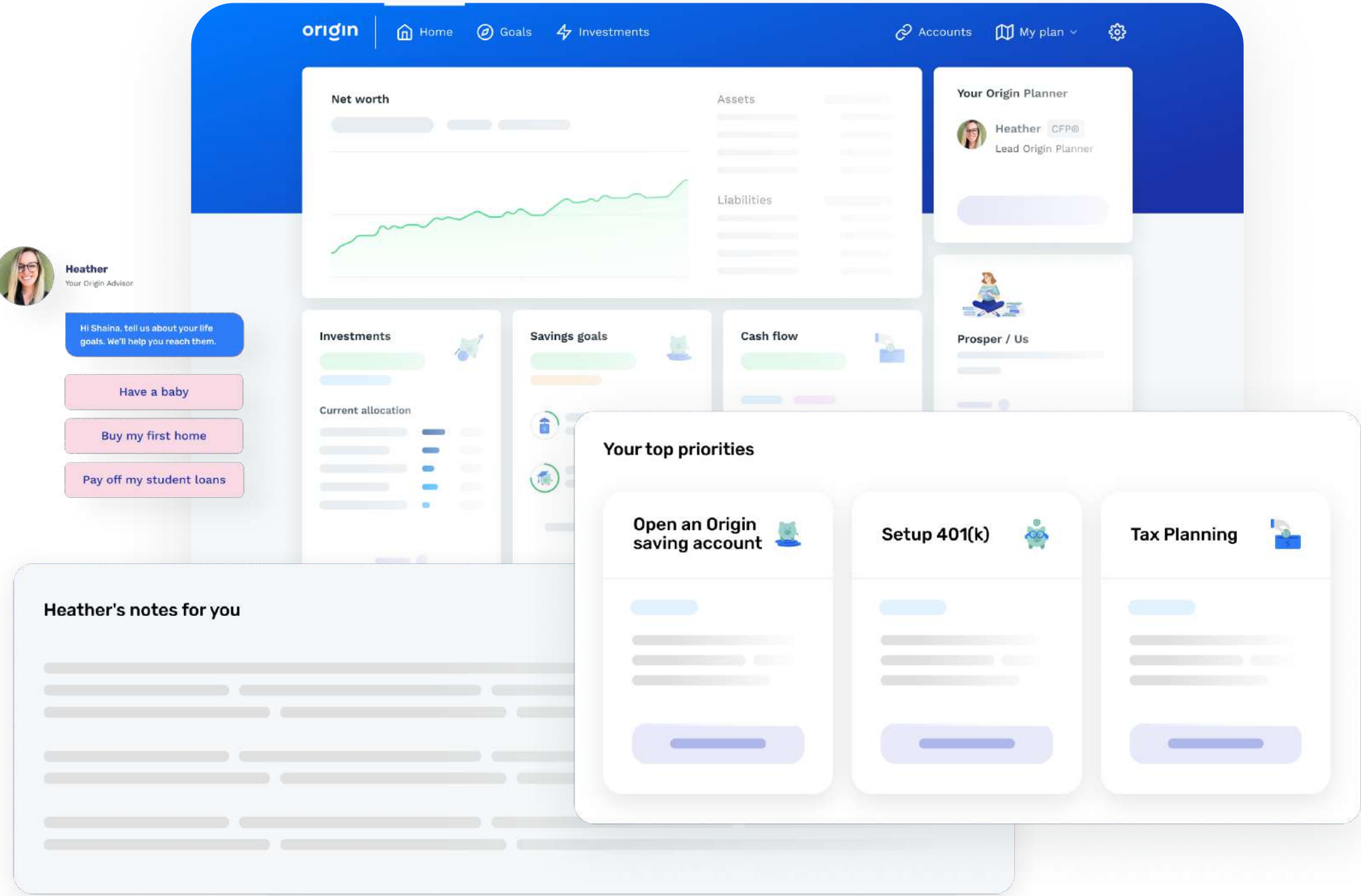
Our solution

We solve the biggest source of stress for your people: **Money**

Financial Planning & Money Management

Improve your company's retention and outcomes by helping your people reach their life goals.

- ✔ Unlimited live access to planners via chat
- ✔ One platform that helps you view and track net worth, set and manage goals, automate saving and investing—and more
- ✔ Customized financial wellness sessions delivered in a group format and tailored directly to what's most relevant to your people



Equity Management + Tax Advice

Free up your People team from administrative work, and attract the best talent with a detailed view of equity.

- ✔ Explain the full value of company equity
- ✔ Help employees understand exercising and taxes
- ✔ Allow employees make the most of everything you offer to them

Meet our customers

We partner with people-first companies, everywhere.



Origin is the fastest growing financial wellness provider in the world.

We founded Origin in 2018 based on the belief that financial planning should be accessible to everyone at every stage of life. Each day we go to work excited to help people figure out how to manage their money for the future, plan for the unexpected and live the fullest lives.

Our team is led by repeat founders and is backed by leading VC firms like Founders Fund, Felicis and General Catalyst.



9.4 / 10

Overall User Rating

84

Net Promoter Score

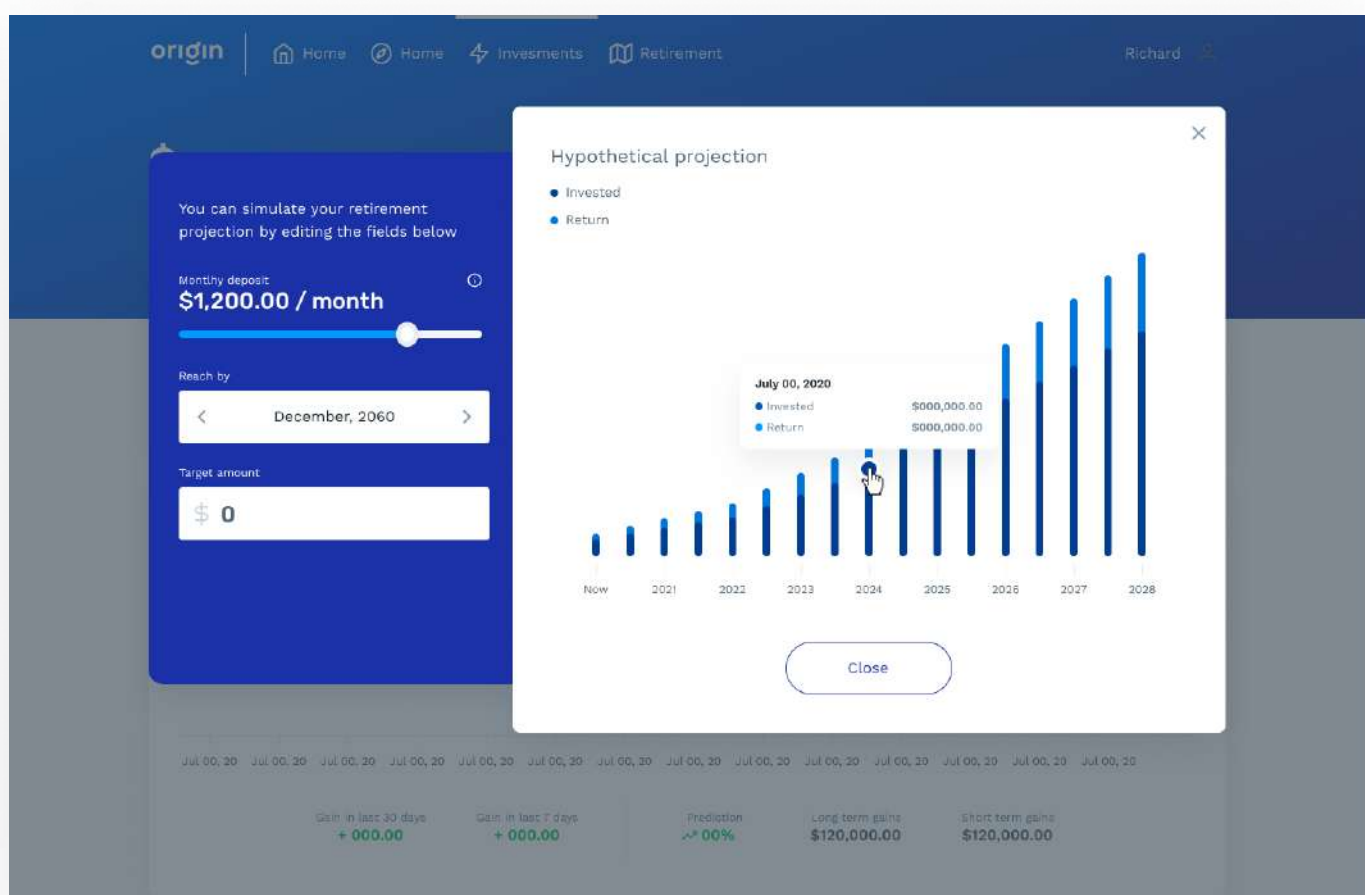
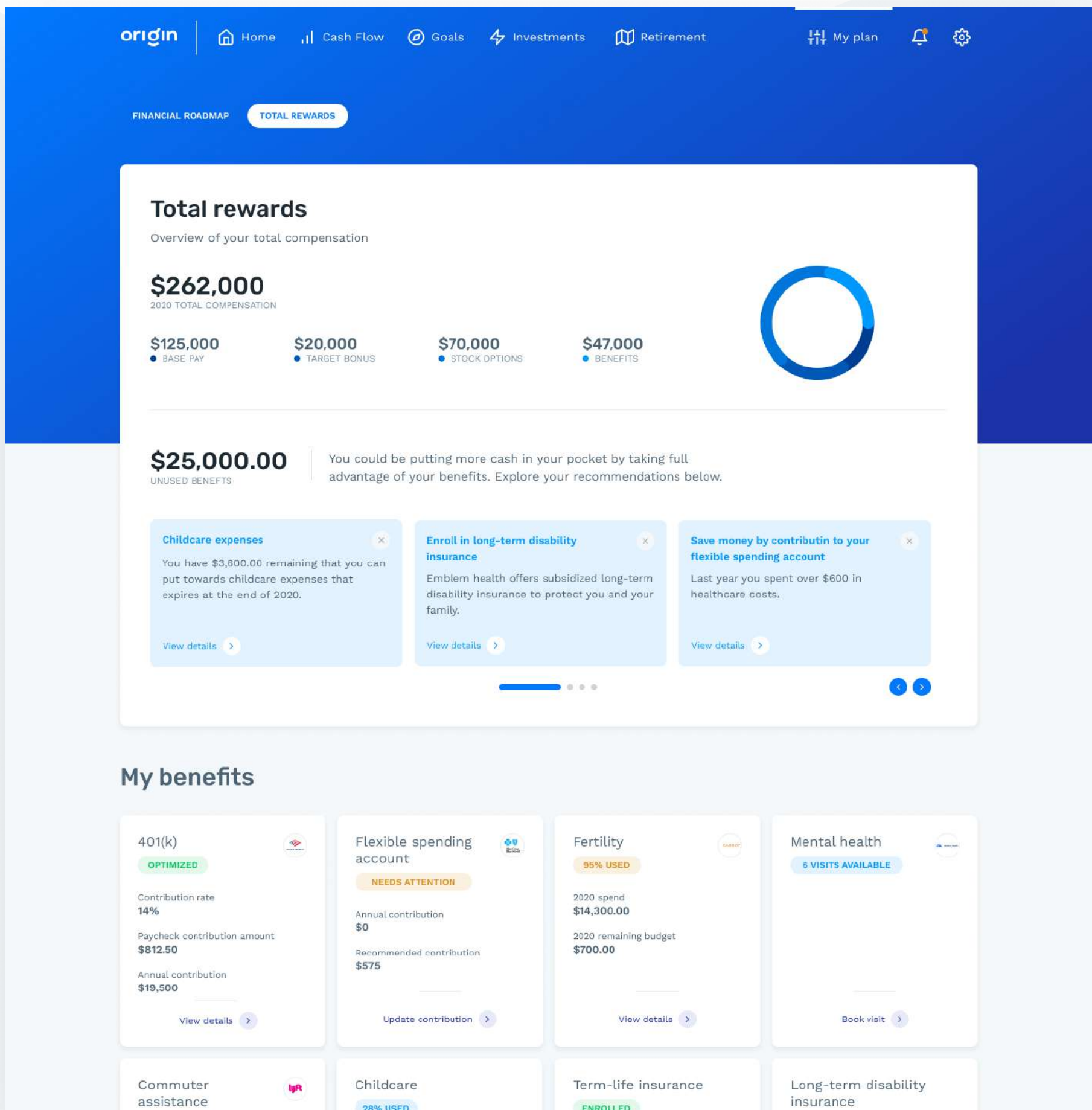
Even more from Origin

A bright future for Financial Wellness and Total Rewards:

- Origin Total Rewards Center
- 401(k) integration & facilitated recommendations
- Investment optimization | Origin Investment Accounts
- Net Worth history & projections
- Targeted cash flow insights | Income distribution recommendations

Total rewards integration & optimization

- ✓ Communicate total rewards broken down by category
- ✓ Show benefits offered and current utilization
- ✓ Contextualized recommendations of ideal benefit utilization to maximize compensation

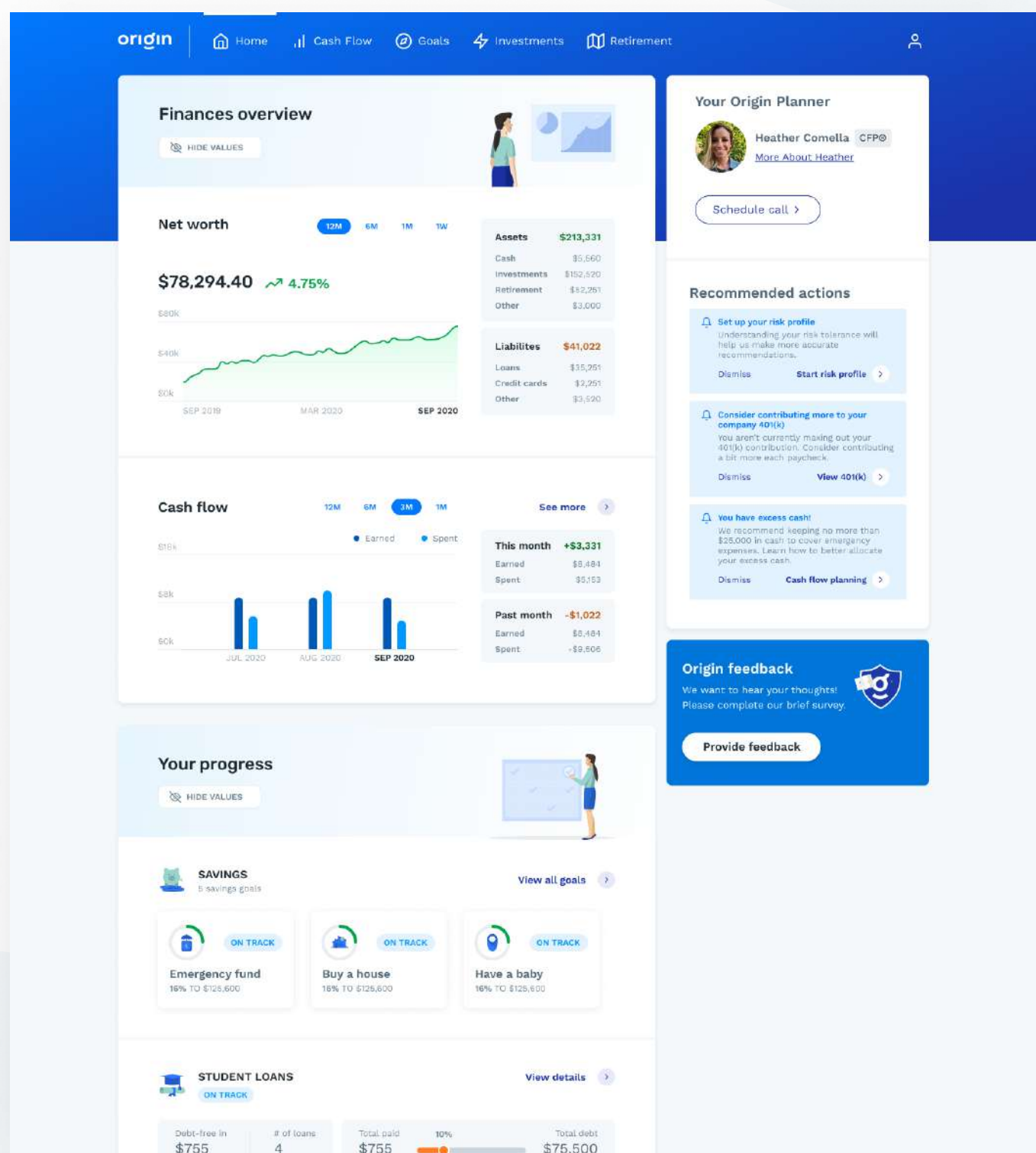
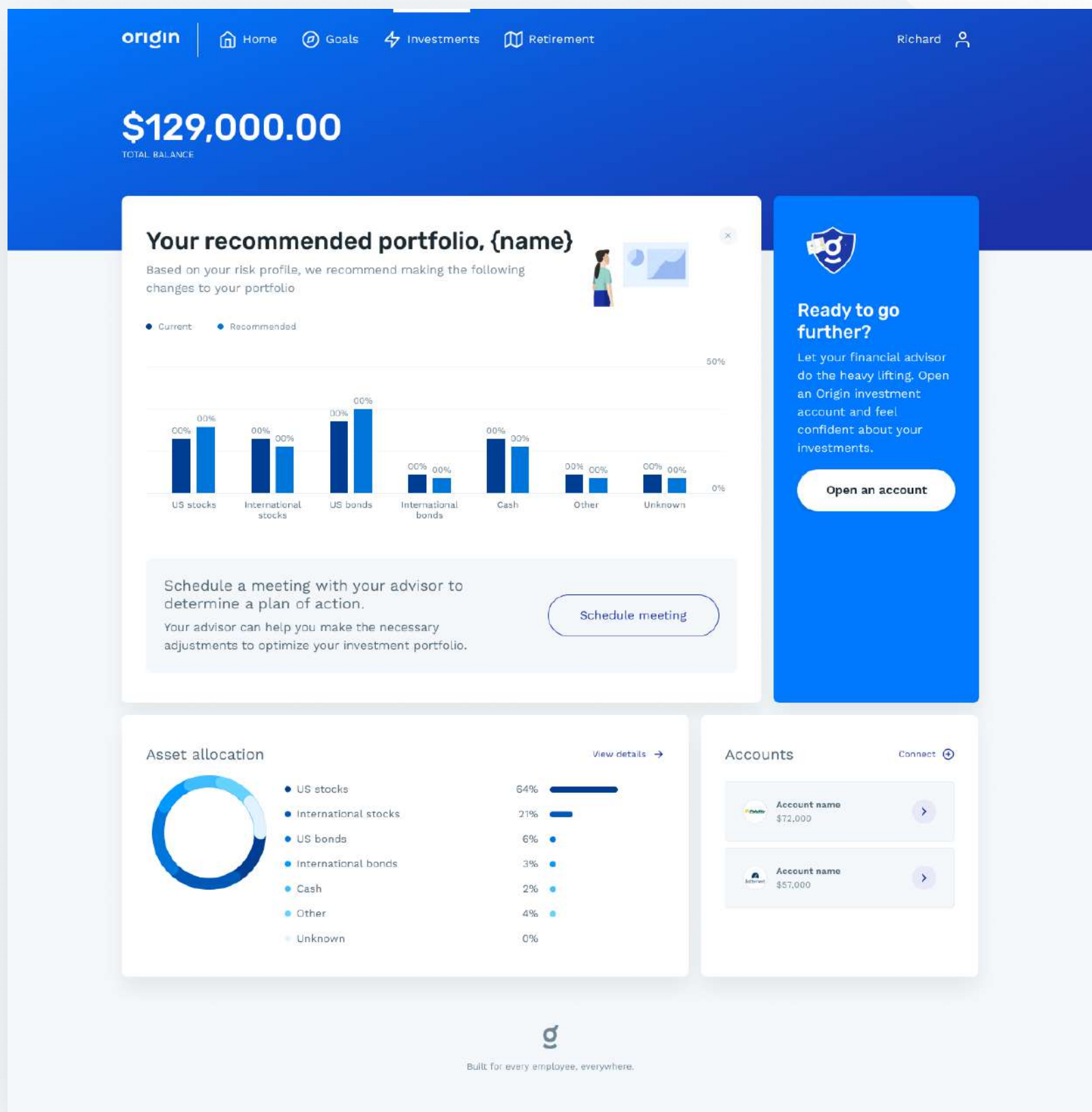


401(k) integration & recommendations

- ✓ Show current retirement account balance and contribution settings
- ✓ Recommend ideal contribution percentage and amounts to optimize tax savings and net worth
- ✓ Project retirement account balance based on scenarios
- ✓ Facilitate contribution changes

Investment optimization & Origin investment account

- ✓ Assess risk tolerance and develop an ideal portfolio recommendation
- ✓ Compare current portfolio to recommended portfolio and recommended changes
- ✓ Open an Origin investment account that matches risk tolerance
- ✓ Automatically deposit money to Origin investment account



Net worth history and projection

- ✓ Calculate and show current net worth broken down by category
- ✓ Show historical net worth and growth over time
- ✓ Project future net worth and make recommendations to optimize

Cash flow insights & income distribution recommendations

- ✓ Show historical cash flow trends and spending analysis
- ✓ Compare spending and saving rates to Origin recommended amounts
- ✓ Recommend income distribution strategies among spending, savings, investments and retirement to optimize net worth

