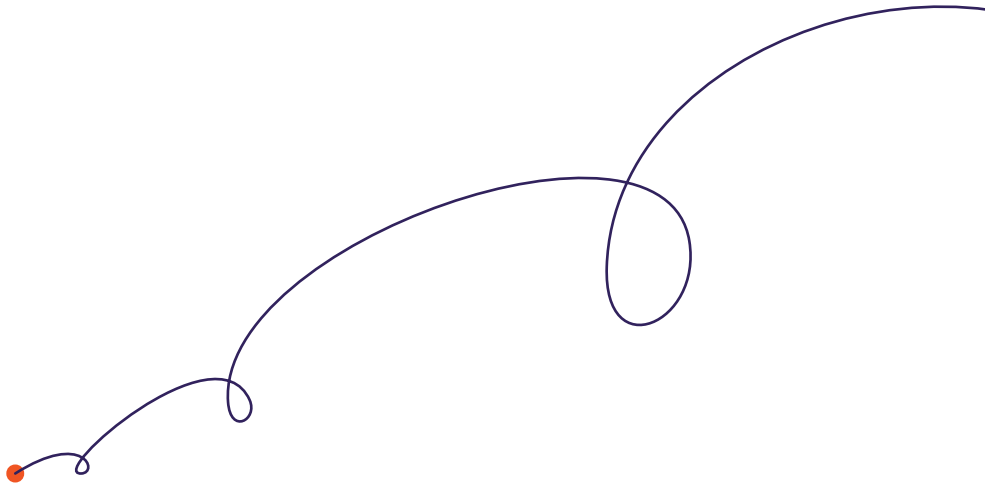


# edukate



**Financial confidence  
starts here.**



# WHAT WE DO

## Making decisions about your personal finances is difficult!

Lots of people never make progress towards their goals because they don't feel prepared to take the first step.

Edukate offers personalized financial guidance and connects you with the most relevant employer benefits to help you make more confident personal financial decisions.



### ENGAGING ASSESSMENTS

Edukate's fun and engaging assessments pinpoint areas of financial stress to recommend the most relevant tools and resources to help you achieve your financial goals.



### PERSONALIZED FINANCIAL GUIDES

Every piece of content in our library is hand-picked by financial experts to give you comprehensive guidance that's easy to understand. No more boring lectures or confusing guides.



# WHAT'S INCLUDED



### CENTRALIZED BENEFIT INFORMATION

Easily engage with all of the benefits made available to you by your employer. Gone are the days of navigating confusing intranets and remembering multiple passwords.



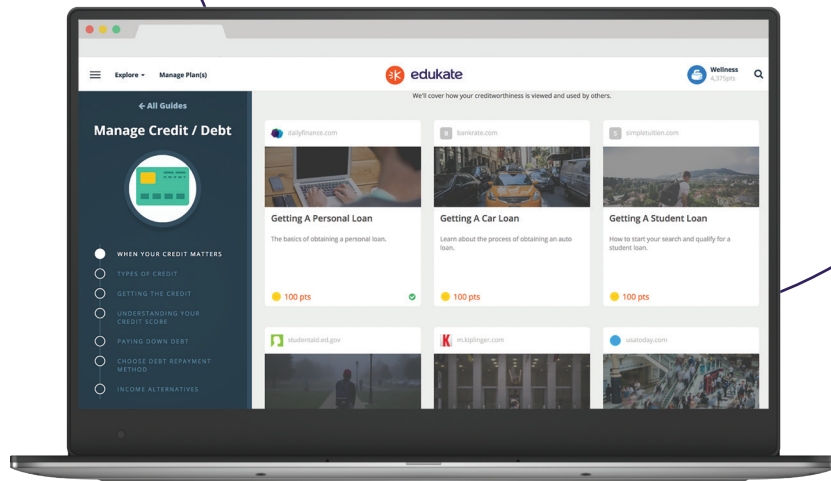
### HELP WHEN YOU NEED IT

Get the most out of your financial wellness benefits by chatting with your plan administrator or the Edukate team anytime. We're here for you.

# MADE FOR YOU

From developing a budget to adjusting your retirement contributions to purchasing your first home, Edukate helps you tackle your financial future with confidence.

With a growing library of over 300 resources, personalized guides, and content that addresses the most common personal finance questions, we tailor our suggestions to your goals and learning style.



01

### ACTIVATE YOUR ACCOUNT

You'll receive an personalized invitation with information to activate your account. Account activation takes less than a minute!

02

### TAKE AN ASSESSMENT

A short, interactive assessment will help you better understand your current financial health—no complicated calculators or confusing lingo, just easy to understand questions.

# GETTING STARTED

03

### START LEARNING

Based on your assessment results, you'll see recommended content and tools to help you on your financial journey. Start with easy, introductory topics and progress to more advanced topics as you learn.



# WHAT'S NEXT?



## GET FOCUSED

Set a financial focus and we'll guide you step-by-step to tackle your financial stressors.



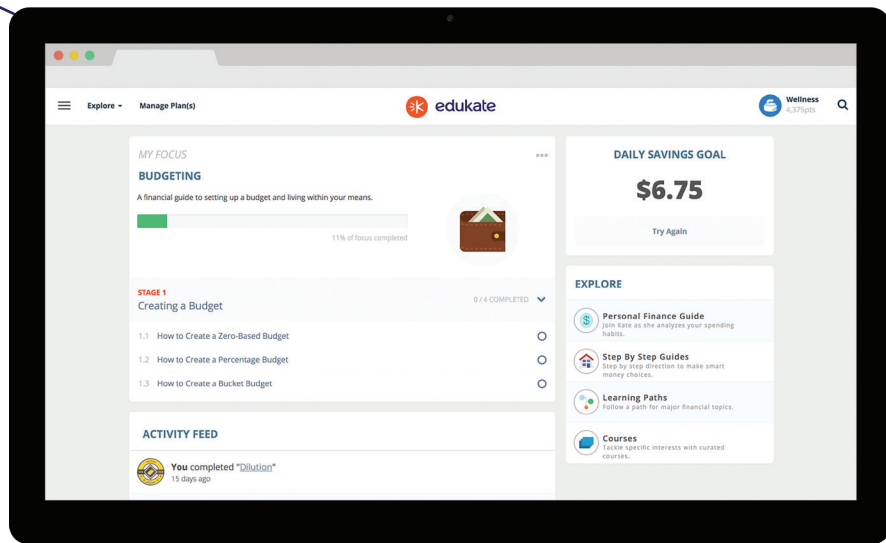
## MEET KATE

Use the Kate tool to get deeper insights into your saving and retirement goals.



## EXPLORE

After you conquer your financial focus, explore the rest of the Edukate library to accelerate your personal financial progress.



## MOVE UP THE RANKS

As you learn, you'll earn points and badges to highlight your accomplishments. When your employer runs contests, points will help you move up the leaderboard to get closer to prizes. Cha-ching!



### **YOUR INFORMATION IS CONFIDENTIAL**

Your information is anonymized and safe with us. We'll never share your financial successes or stresses with your employer or with any third-party companies. We only use your information to curate content to help you on your financial journey.



### **DOCUMENT ARCHIVE**

We archive all of your benefits information and notify you when anything changes. You can view your documents anytime, directly from your dashboard.



### **COMPLETELY PAPERLESS**

Say goodbye to keeping track of confusing paperwork. Get your communications faster by going paperless and getting on-demand access to plan documentation and updates.

# **SAFE & SECURE**



# FOR EMPLOYERS



## COMMUNICATION

EduKate's communication tools work just like email and make it easy to send bulk messages, reminders, and plan-specific information to employees.

## CONTESTS

Increase engagement rates with built-in contest tools. Contests can be created as raffles or leaderboard-style competitions. While contests are running, employees can track their own progress and get access to contest information from their dashboard.

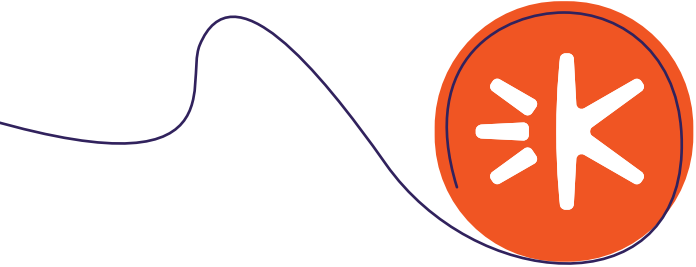
## CUSTOMIZATION

Use your own logos and brand assets to create a more unified experience for employees using EduKate. Your branding can be used across the platform and in communications sent to employees.

## ANALYTICS

Review aggregate data and create reports of how employees are using EduKate and growing in their financial confidence. Get information about their top areas of financial stress to better curate content to target those areas of need.





[hello@edukate.com](mailto:hello@edukate.com)