



Financial Fitness Group

THE FINANCIAL FITNESS PROGRAM: SCALABLE FINANCIAL EDUCATION THAT DELIVERS RESULTS

The Financial Fitness Group has built a powerful e-learning platform with a comprehensive feature set that enables anyone to successfully run and manage the program with minimal time and effort.

GETTING STARTED: WE'RE WITH YOU ALL THE WAY

We make it easy by providing all the tools and support you need from start to finish.



[REQUEST A DEMO](#)



“Rolling out the program was very simple and was easier than I thought it would be. There was a lot of positive feedback. Over 90% of the participants said they would repeat the program and recommend it to others, so I’d say it was very well received.”

– Rich Hunt, Director of Retirement Services, Major League Baseball

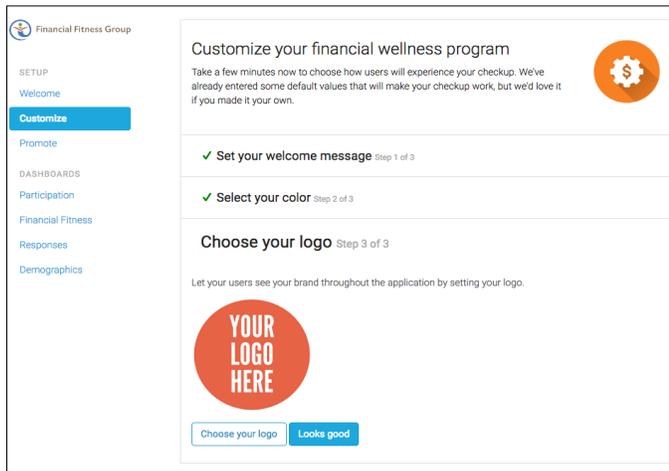
1. Prior to the program, we help you build excitement with turnkey promotional materials and auto-email messaging.

2. Before and during the program, we help you build participation with proven tools and tips.

3. We provide participants with weekly reports to help motivate, encourage and keep participants engaged!

4. Participants earn points after completing tutorials. Admins have access to a robust analytics dashboard so they can measure participation and progress.

FLEXIBLE, CUSTOMIZABLE, AND SCALABLE SOLUTIONS



Financial Fitness Customize Tool

Financial Fitness Group has a proven training program that improves employee productivity, increases participation in retirement plans, produces more engaged workers, and helps your bottom line.

1. The admin customizes the look of the tools to match the company branding.
2. Employees take the 10-minute Financial Fitness Checkup™ and discover their Financial Fitness Score™.
3. The platform suggests courses and Center and Academy tutorials based on each employee's assessment results.
4. Admins have access to real-time analytics and business metrics that show employee insights.
5. Enjoy happier and more engaged employees throughout the year as they continue their ongoing financial education.

TURNKEY WITH AUTOMATED, MULTI-FACETED TOOL SETS

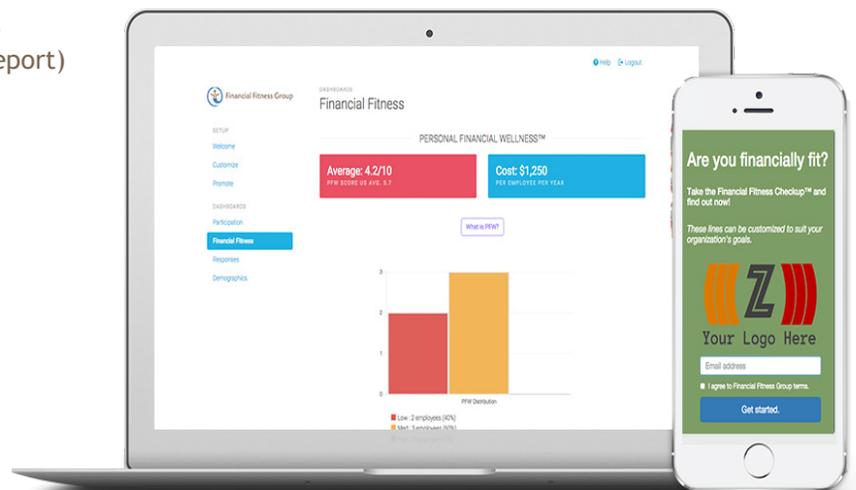
Communications tools are accessible from the same user-friendly administrator portal dashboard. They include access to progress snapshot reports, the auto-email scheduler, the participant database, and the Marketing Toolbox.

Promotional marketing materials such as robust, automated email communications are ready to use or customize, and send directly to employees. We have developed best practices and compiled a library of valuable tip sheets with proven programs and ideas to help you set up and lead a successful program at your organization.

Reporting tools include key performance indicators such as a quick-look snapshot of program evolution. At all stages of the program, you'll have access to the ongoing progress and coursework completed by all participants in a single-view, consolidated report.

Employees complete pre- and post-tests for each course. A program summary report documents the changes in knowledge, behavior, and attitudes across the organization. (Show or link to sample report)

Employee reward and motivation tools keep engagement and completion rates high.



Standalone e-learning platform

- Anytime access on any browser 24/7 via computer, tablet or smart-phone
- Requires no installation or downloads

Professional support from our dedicated team is available to help you during any phase of the program from implementation to completion.

Three training toolsets include:

Quick start champion training tools, champion training webinars and online training.

Start and stop the program on your own timeline. Our updated platform includes a yearlong subscription and you have the flexibility to promote it whenever you would like.

Data security and privacy are safeguarded. No data is shared, sold or used for any purpose other than reporting. Admins do not have access to individual employee responses.

CURRICULUM OVERVIEW

Financial Fitness Group offers unbiased online personal finance and investment education that meets ERISA obligations and is accessible from any Internet-enabled device.

“This format allowed our employees to learn on their own time whenever and wherever they were. The 24x7 access met the demands of our workforce and their busy work schedules,” said Evan Thoman, health and wellness coordinator, Charleston Area Medical Center.


Financial Fitness™
CENTER
Self-Paced Education Library
\$20 per employee / year

- 150+ interactive online tutorials designed to teach employees about personal finance, saving and investing, and retirement
- Automated promotional emails
- Real-time data reporting and admin dashboard
- Includes our checkup assessment for your company with upgraded feature customizations
- Post-education Checkup™ so you can track financial education performance overtime
- In-depth business intelligence and analytics reports
- Easy co-branding
- Dedicated support team


Financial Fitness™
ACADEMY
Guided Education Platform with Progress Tracking
\$30 per employee / year

- Everything in the Financial Fitness Center, plus ...
- 350 MORE tutorials, plus additional education pieces
- Recommendation engine suggests easy-to-follow course plans
- Employees are rewarded with points and badges
- Expanded administrative intelligence and analytics
- Ability to separate analytics between sub-organizations in one dashboard
- Increased employee engagement through automated progress emails
- Comprehensive tracking and password-protected user access

THE FINANCIAL FITNESS GROUP

The Financial Fitness Group (FFG) provides online tools and software applications that deliver powerful, interactive personal finance and investing learning solutions. More than 700 industry leaders like Ameritrade, Morningstar, Intuit, Staples, Cornell University and New York Life use FFG products to augment wellness benefits and provide accurate and unbiased FINRA-compliant content. The Financial Fitness Group is headquartered in San Diego, with offices in San Francisco