



DIGITAL FINANCIAL EDUCATION FOR YOUR COMMUNITY

Financial education for adults is essential to ensure they have the tools needed to seek out and trust your institution.

EVERFI Achieve: Build Financial Capability with a Customizable, Data Driven Solution

Empower consumers and employees by scaling your financial education program with EVERFI *Achieve*.

Institutions using *Achieve* have access to 50+ branded educational module and articles covering critical concepts like loans, mortgages, building credit, and saving, plus the ability for your institution to add incentives after learners complete specific modules.

Administrators of *Achieve* have access to usage and engagement dashboards, plus the ability to gain deeper insights by enabling Single-Sign-On, importing data to your CRMs using an API, and integrating with tracking, retargeting, and analytic tools like Adobe Analytics or Google Tag Manager.

EVERFI Achieve AT A GLANCE



Adapt to Digital First

Meet consumers and potential customers where they are - online. *Achieve* can be embedded, deep-linked, or on a custom landing page.



Build Loyalty & Drive Next Steps

Build loyalty by providing incentives and branded information on custom moment pages throughout *Achieve* playlists, and track success on *Achieve* dashboard.



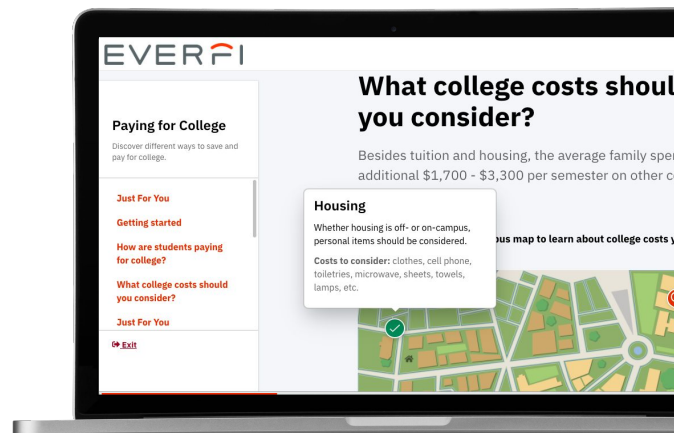
Collect Data to Inform Strategy

Obtain valuable insights into key topics and learner sentiments to inform new business, marketing, and community outreach initiatives.

HIGHLIGHTS: FEATURES & FUNCTIONALITY

- ✓ Branded Calls to Action & Custom Moments
- ✓ Data Dashboards & Reporting
- ✓ Modules Available in English & Spanish
- ✓ Implementation Support

EVERFI



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PLAYLISTS & TOPICS

Each playlist covers a single topic through a series of microlearning moments (3-6 minute modules), providing targeted answers to learners' questions.

Below are the seven standard playlists* made up of 50+ learning modules and articles. Content is built towards ADA compliance and is device-agnostic.

Banking Basics

Checking Accounts, Car Loans, Preventing Overdraft Fees, Mobile and Online Banking, and more

Building Financial Capability

Budgeting for Families, Identity Protection, Credit Scores & Reports, Debt Management, and more

Retirement Planning

Planning for Retirement, 401k Plans, When to Collect Social Security, IRAs, and more

Homeownership

Mortgages, Reverse Mortgages, Buying a Home, Mortgage Relief, Investment Properties

Saving and Investing in Your Future

Paying for College, Shopping for Insurance, Health Savings Accounts (HSA), and more

Small Business Basics

Developing a Business Plan, Financial Statements, Obtaining & Using Credit, Financial Wellbeing for Entrepreneurs, Small Business Banking, and more

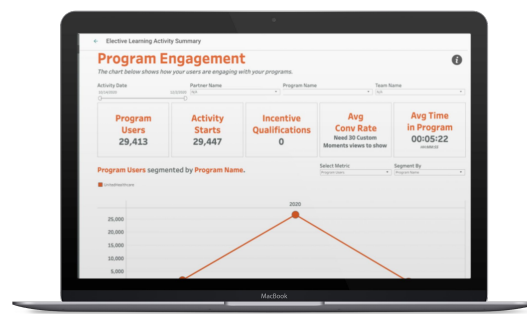
Financial Caregiving

Preventing Elder Fraud, Reporting Elder Financial Abuse, Planning for a Caregiver, and more

*Learners can take a brief survey to start *Achieve* and receive a personalized playlist relevant to their financial goals.

DATA & REPORTING

Leverage the robust data and reporting features of *Achieve* to gather key insights on the financial needs and priorities of customers.



Data Dashboard Insights Include:

- Aggregate data of top playlist and modules
- Aggregate poll and survey results
- Custom Moment conversion tracking
- Site traffic and acquisition data



IMPLEMENTATION

Achieve can be implemented in one of three ways:

- Custom Microsite
An EVERFI hosted site that supports branding, learner registration, and data tracking.
- Embedded Content
Embed gives institutions the option to launch playlists directly from their website.
- Deep Linked Content
An institution-hosted page that directs learners to content hosted by EVERFI.