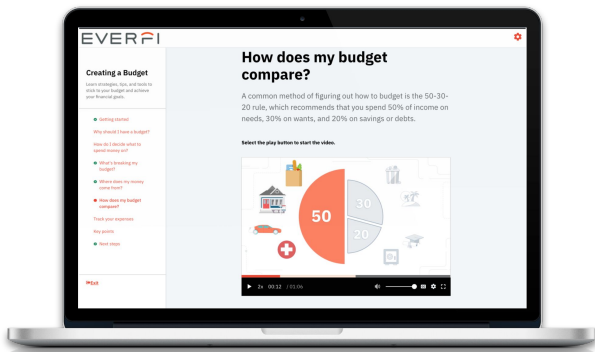




Strengthen Relationships With Workplace Banking

Today, financial institutions face an increasingly crowded and competitive landscape as they try to retain and attract commercial partners and compete for new consumers. But what if there were a simple way to create and maintain deep relationships with commercial partners and reach potential consumers at scale?



EVERFI's *Workplace Banking* education program enables financial institutions to deliver white-labeled and personalized financial education to the employees of commercial partners, providing a critically-needed benefit to address financial wellness and workplace productivity. Through this program, financial institutions are able to deepen their existing commercial relationships by providing valuable insights to their partners, win new commercial business by providing a differentiated and consistent offering, and attract new consumers through expanded channels.

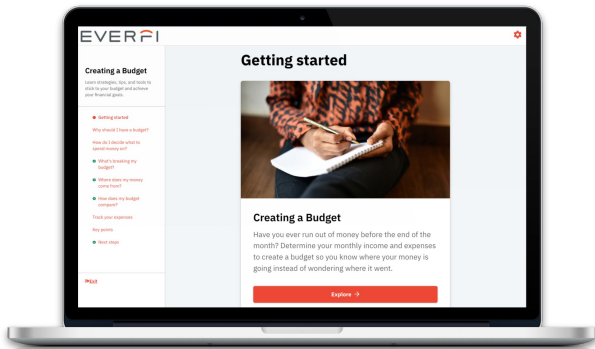
WORKPLACE BANKING FINANCIAL EDUCATION BENEFITS

Attract New Business

- Deliver a unique financial education offering that will differentiate you from competitors
- Drive engagement with new customers and members by pairing education with timely and relevant calls-to-action
- Provide unique product and service recommendations to consumers
- Incentivize new consumers to engage with the platform

Deepen Existing Relationships

- Add value to your current commercial relationships
- Provide valuable qualitative & quantitative data to HR teams at participating organizations
- Deliver targeted and consistent financial education workshops that uniquely address the needs of each organization and ensure long-term relationships

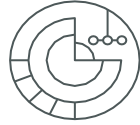


WORKPLACE BANKING WORKFLOW



Engage

Provide white-labeled online financial education to the employees of your *Workplace Banking* partners



Calibrate

Based on data from the online education program, determine the most appropriate topic areas for in-person, online & hybrid workshops



Inform and Educate

Deliver workshops on the topic areas most relevant to the employees of each *Workplace Banking* partner organization



Connect

Following the workshop, employees can review additional materials online to deepen engagement with your institution

FINANCIAL EDUCATION POWERED BY TECHNOLOGY

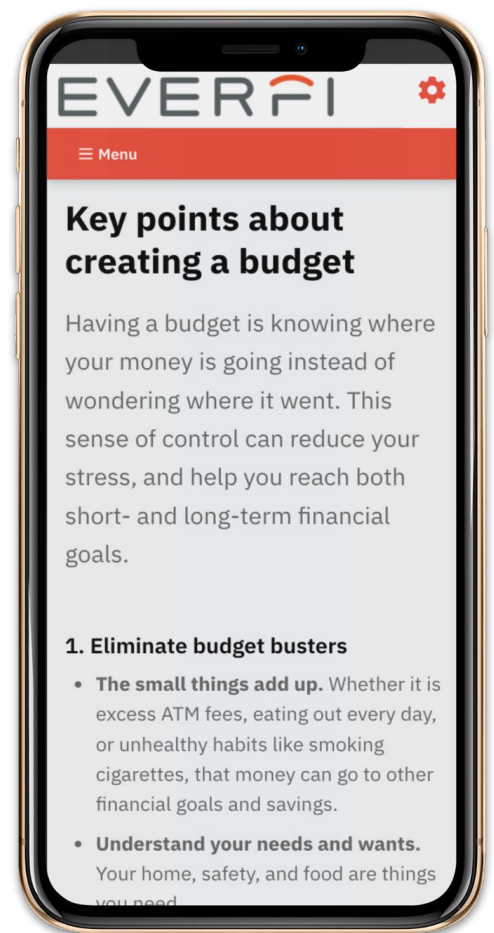
EVERFI's *Workplace Banking* program is built around a cutting-edge curriculum and state-of-the-art digital platform. This allows financial institutions to both provide financial education and produce valuable insights on the financial health of an organization's employees. Financial institutions will also have access to EVERFI's exclusive Partner Resource Library, which has marketing toolkits, communications templates, and case studies to help drive impact and scale.

Digital Financial Education

- 60+ online financial education experiences 5-7 minutes each
- Custom calls-to-action to promote products & services
- Interactive, engaging & mobile-first
- Available in English & Spanish

Hybrid Financial Education Workshops

- Turnkey content to lead engaging and consistent workshops in a variety of formats & technological environments
- Facilitator guides, participant guides, and train-the-trainer materials
- Comprehensive data and event management system
- Available in English & Spanish



Creating a Budget Module

[EVERFI.COM/WORKPLACEBANKING](https://www.everfi.com/workplacebanking)

EVERFI

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EVERFI, Inc. is the leading education technology company that provides real-world education to learners of all ages through innovative and scalable digital learning.