Seedwell

Financial Wellness Portal

Seedwell

Personal Finance can be intimidating...

...and even when you begin learning, it's easy to feel lost.

With all the different account types, advertising, and new vocabulary, employees need an approachable platform that makes learning relevant to their life. Employees also want to trust that content is accurate, up-to-date, and unbiased.

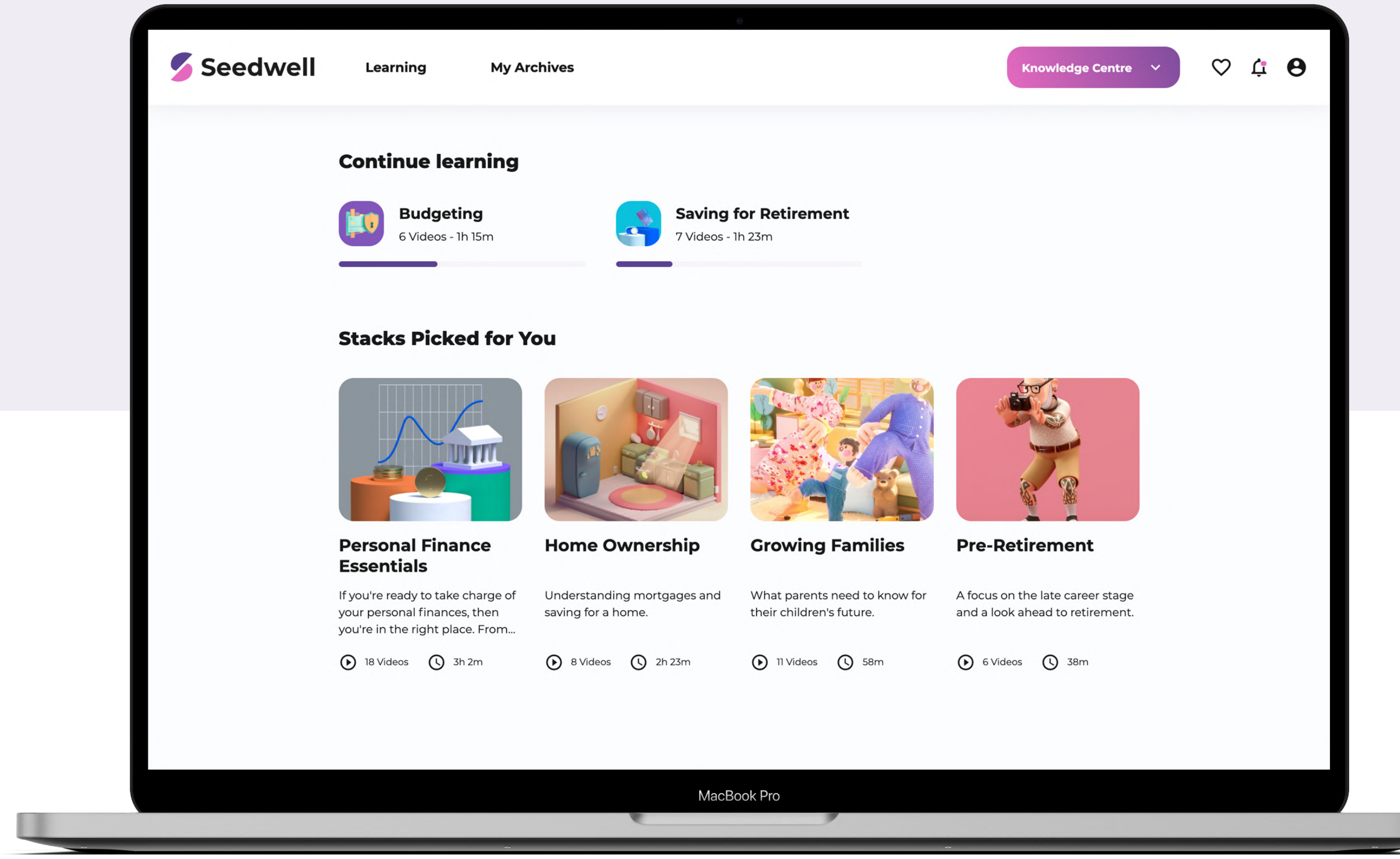
Your workforce might be struggling with financial health issues:

1. Employees feel overwhelmed with their personal finance situation and don't know where to start

2. Employees can bring financial stress to work which adversely affects their productivity, retention, and mental health

3. Employees don't know about or take full advantage of retirement, pension, and other financial wellbeing plans

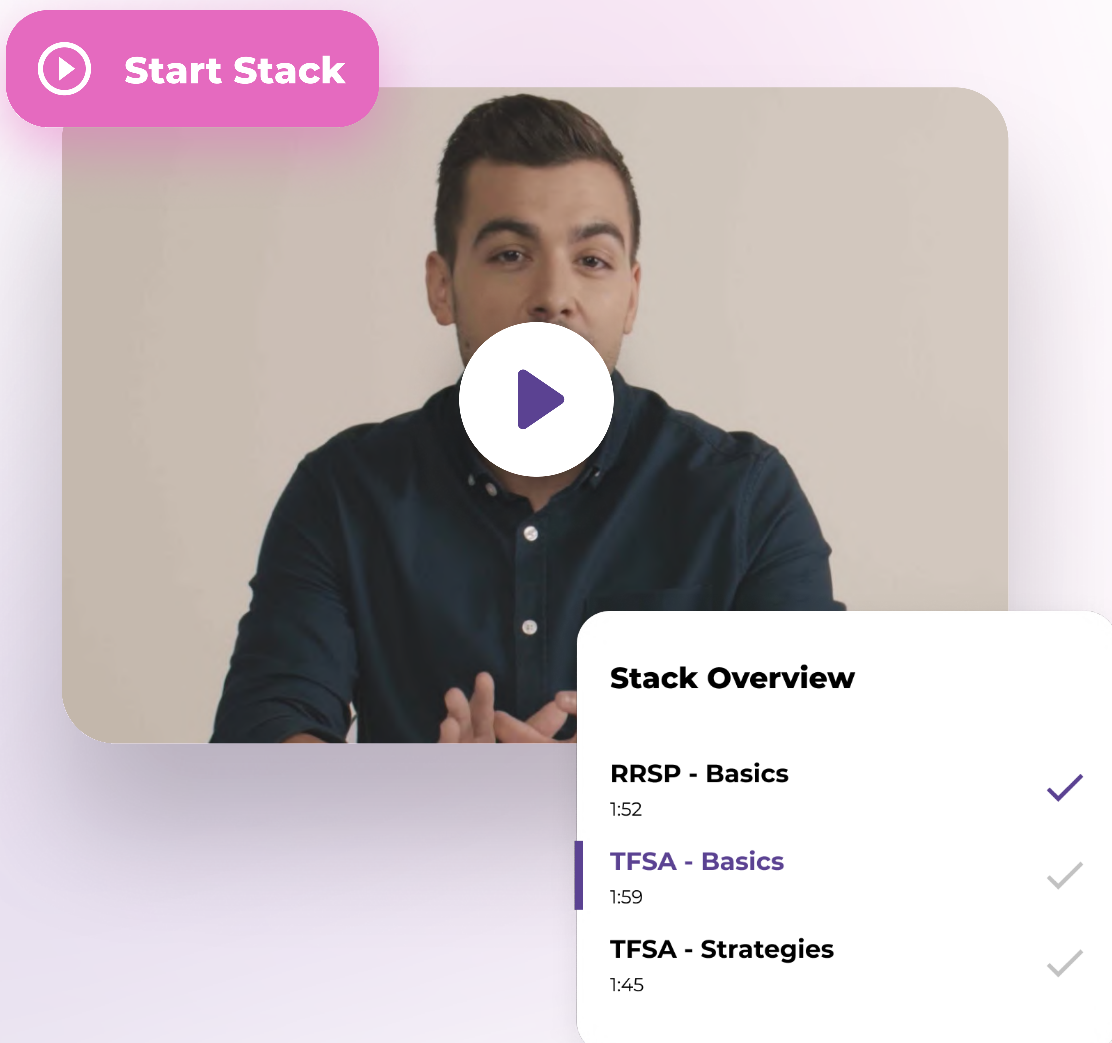
Intuitive learning experience for everyone



As you embark on your learning journey, the Financial Wellness Portal provides:

- Knowledge stacks that group relevant courses into easy to use playlists developed by experts
- Unbiased video, audio, and written content to support different learning styles
- Finance concepts that are linked to hands-on tools, including calculators, quizzes, and checklists
- Community forum for peer support, questions and answers, and discussions*
- 1-on-1 financial advisor support for learners*
- Customizable content and platform to gamify and incentivize people to engage with content
- User friendly design that is easy to navigate
- Seamless experience on desktop, tablet, and mobile in English and French, and accessible 24/7

** Available on select plans*

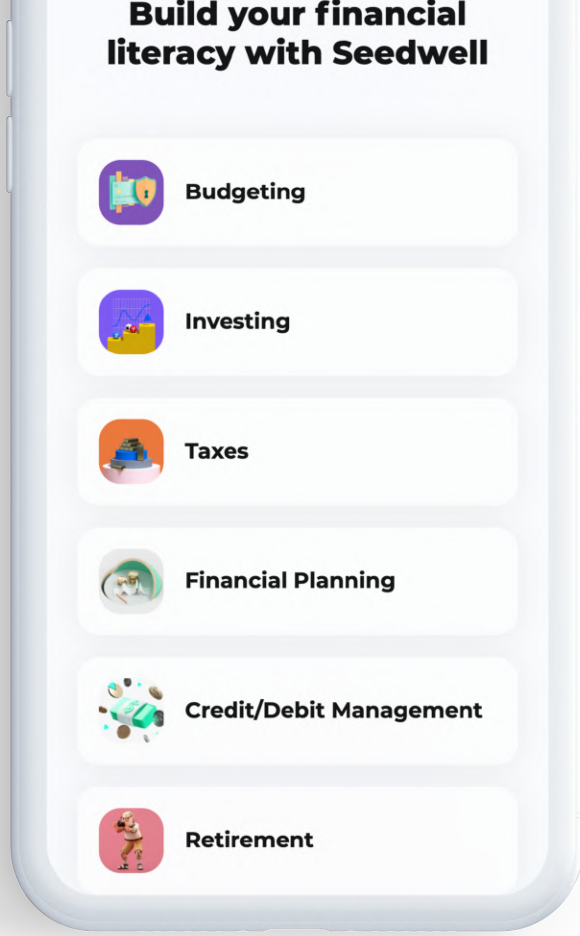


A modern workforce needs a continuously evolving personal finance curriculum

The Financial Wellness Portal is always reviewed by experts and up-to-date on topics including:

- Chequing and Savings Accounts
- Taxes
- Debt Management
- Budgeting
- Investment Accounts
- Investment Types
- Workplace Plans
- Behavioural Finance

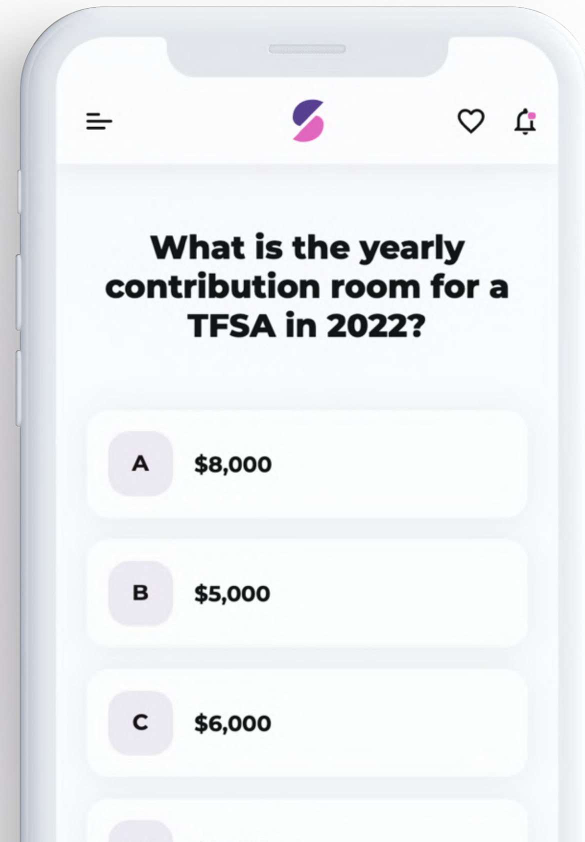
New material is continuously added to the platform and the content can be customized for your workforce needs.

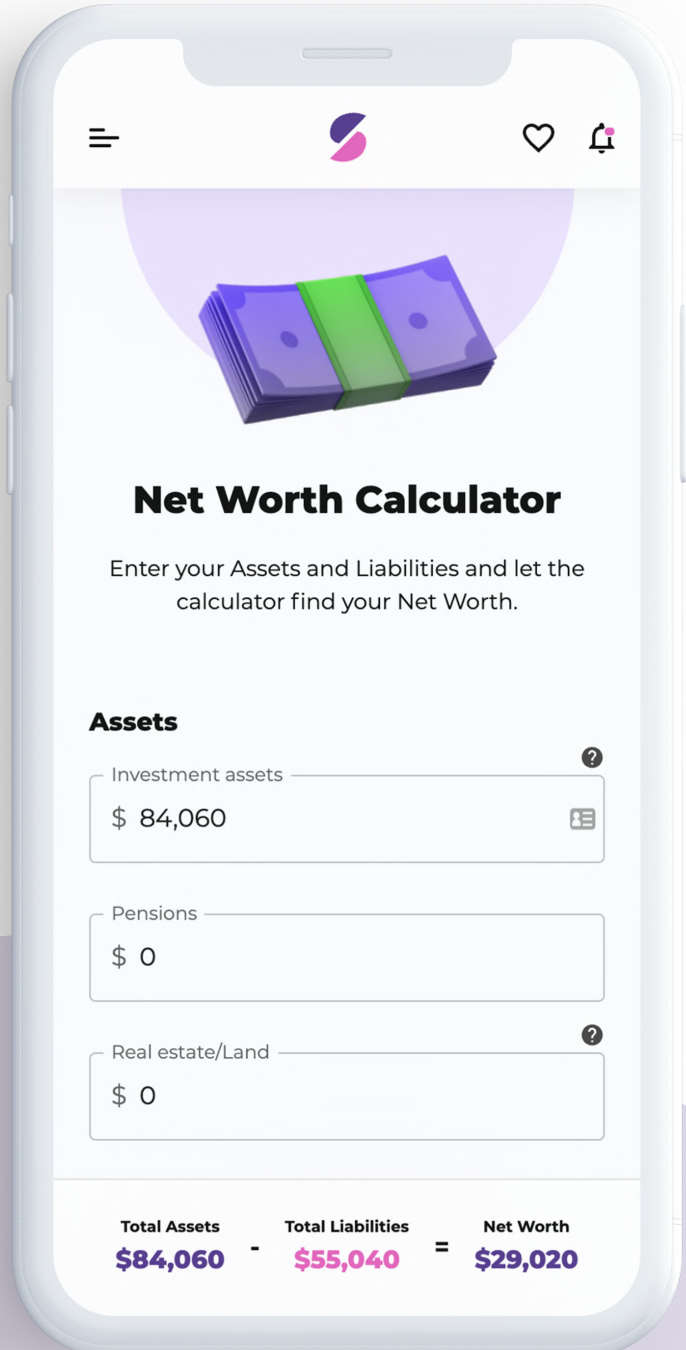


Help employees build knowledge and say goodbye to financial stress

Knowledge Stacks are an innovative form of tailored learning developed by Seedwell. In order to maximize focus, relevancy, and retention, we approach each topic with a combination of videos, articles, quizzes, checklists, and calculators.

Through this, we accommodate different learning styles, deliver the most important content, and provide practical tools for learners to apply to their own life.





Get the tools you need to plan your financial life

Crunching the numbers has been simplified with the largest interlinked database of personal finance calculators and financial literacy educational content.

When connected with Seedwell's Automated Income Allocation, your financial data will be prepopulated into the calculators.

Dive deeper into your understanding by applying new concepts in the Knowledge Stacks to your unique personal situation. Use that information to calculate the impact on your life and plan your ideal financial future.

Track your progress with digital checklists

Take a proactive approach to managing your personal finances by completing tasks in your financial wellness checklist. The checklist only displays areas relevant to your specific financial situation, and grows alongside your goals.

From understanding the key fees and terms of your everyday accounts, to credit cards and investment accounts, you will be better positioned to tackle any financial dilemmas that might occur in the future.

Use the checklist to track and evaluate your progress in your learning journey and be proud of your accomplishments!

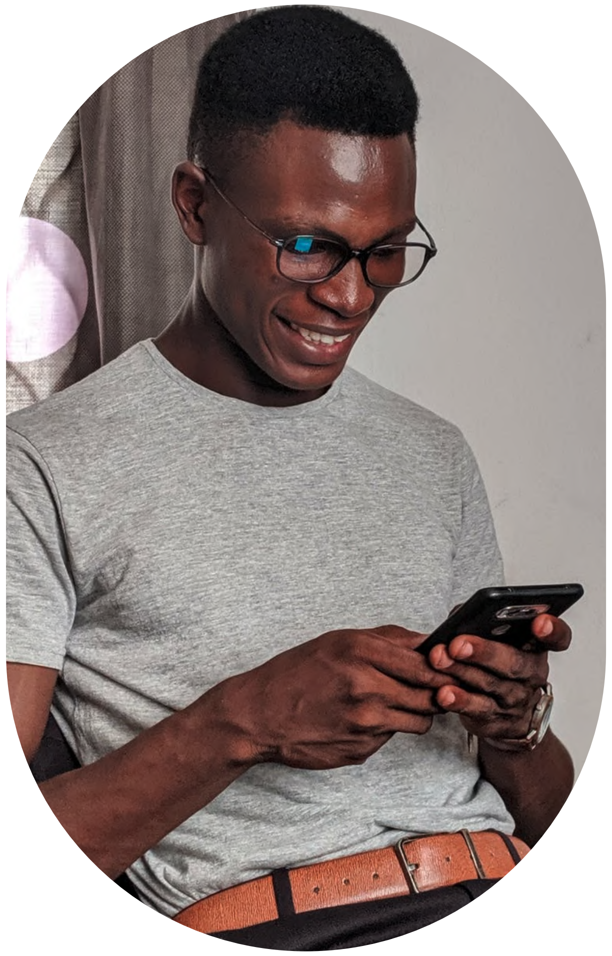
Chequing accounts

- [ ] Compare the number of transfers and transactions you normally do in a month to the allowed limits of your account, and review if there are cheaper account options.
- [ ] Confirm if your account will eliminate fees if you maintain a certain balance level, or if other accounts would be more appropriate.
- [ ] If your financial institution offers overdraft protection, review how it works and any fees involved, and switch options if you need a better solution.

Designed to complement your benefits plans

Fits with your current plans and programs. The financial literacy education augments the participation and utilization of your workplace benefits. Boost the effectiveness of your existing benefits investments while adding more wellness coverage.

Quick and easy to implement. You can setup the platform and roll it out with little effort. To prepare for a successful launch, you will receive communication materials designed to engage your employees.



Deliver expert-led events and webinars for your employees

With the Seedwell Financial Wellness Portal, you can communicate with your workforce with live events and webinars and allow individuals to view past and recorded sessions.

Seedwell is continuously creating new content and listening to the needs of employees. We regularly host topical webinars and have functionality to invite other third parties, such as your benefits, insurance, and retirement plan administrators.

Feel free to make a request, or send us your internal presentations, and we take care of the rest.

April 2022

Events

Recommended

02 — **Budgeting 101 Webinar**
9AM • Company Event

21 — **Saving Strategies for Families**
2PM • Seedwell

Upcoming

02 — **Budgeting 101 Webinar** — Attending
9AM • Company Event

08 — **Real Estate Webinar** — Register Now
10AM

16 — **How to Deal with Debt**

Thrive financially

There's no better time to help your employees achieve financial wellness. We're here to help you every step of the way.

Let's get started →

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