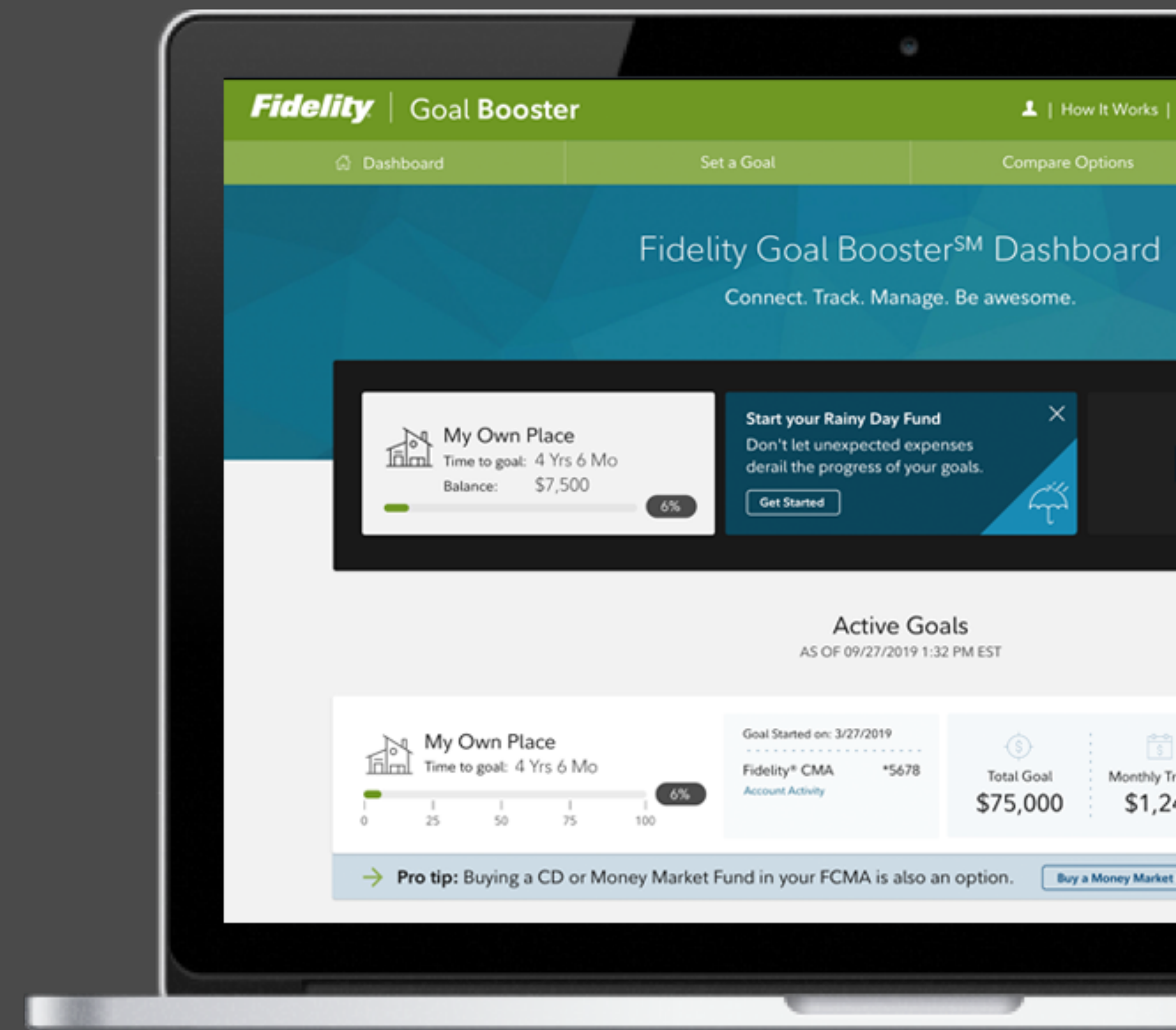


Helping Employees Save for a Rainy Day



Top 3 Goals with Dedicated Account

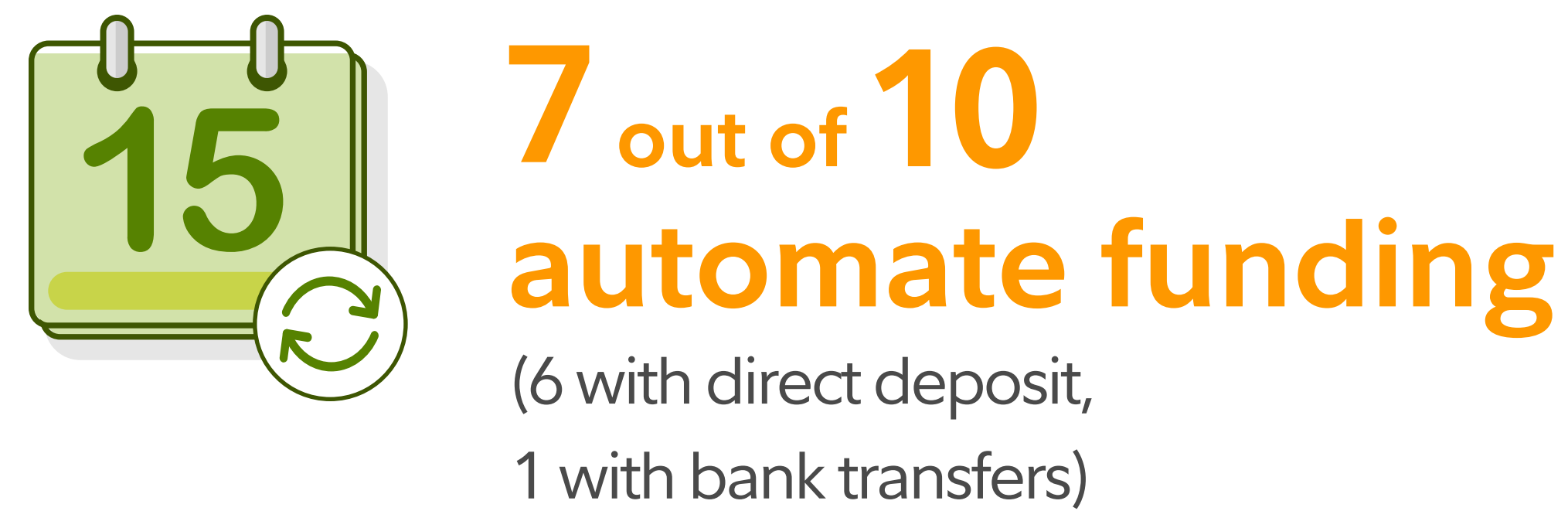
	1 Rainy Day	2 Home	3 Other	Average Employee Goal
Average Goal Timeline	2yrs	3yrs	3yrs	1.7yrs
Average Goal Target	\$5k	\$44k	\$21k	\$13k



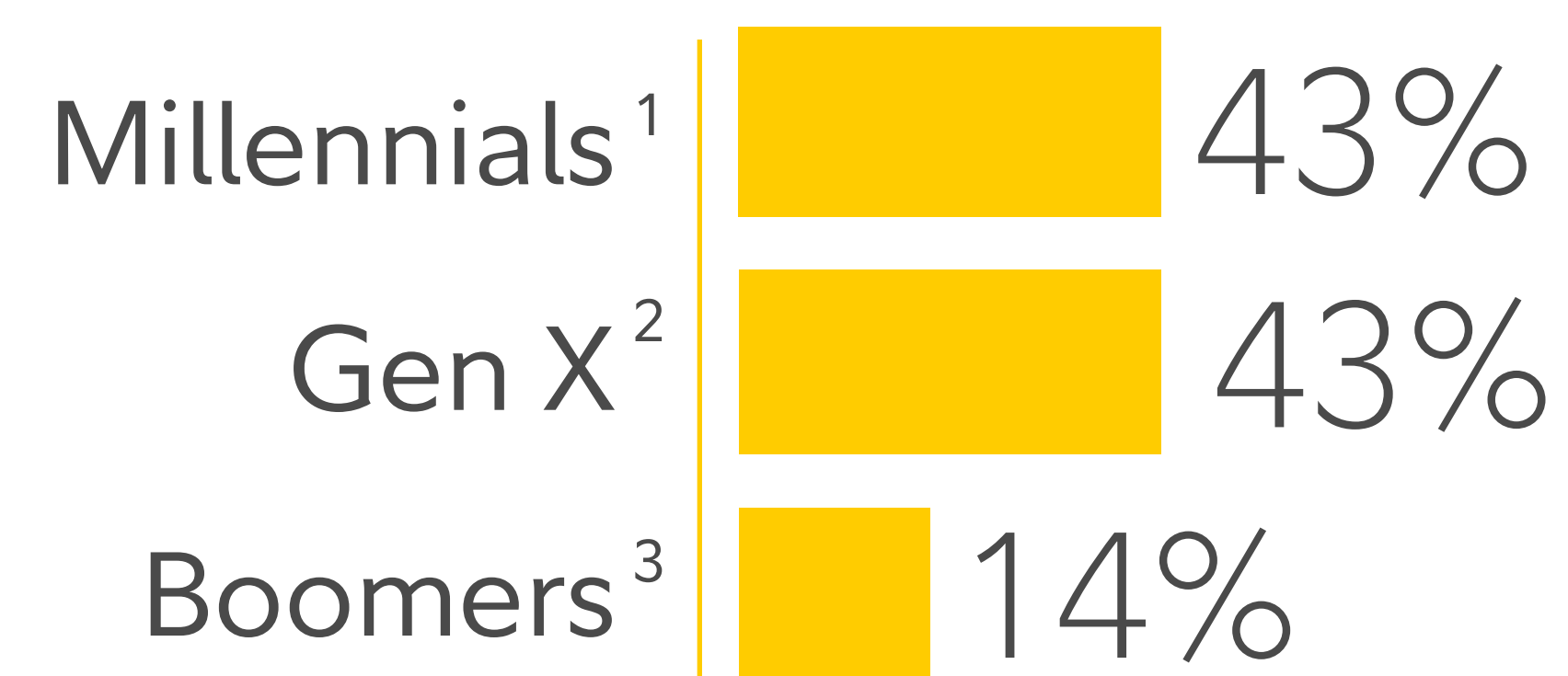
IMAGES ARE FOR ILLUSTRATIVE PURPOSES ONLY

Different Savers, Different Styles

Goal Booster offers different funding options to make it easy to save or invest no matter the funding preference.



User Demographics



Just a note to say "yay!" because you're halfway!



Milestone and engager emails help keep savers focused and motivated.

*"This is my first time actually saving money in a long time. **And to see that I'm reaching my goals—it's refreshing to say the least.**"*

— Q4 2021 | Customer Interview

*"It gave my savings **much better structure**, rather than me just... saving the money in the bank."*

— Q4 2021 | Customer Interview

*"I save money, but... I end up spending it. **Goal Booster is the only way I can actually save money without using it.**"*

— Q4 2021 | Customer Interview

"I have been desperately wanting this type of service—to have multiple goals—so it's easy to keep track of what money is for what."

— Q2 2021 | Customer Survey

Investing involves risk, including risk of loss.

For plan sponsor use only.

The experience of these customers may not be representative of the experience of all customers and is not indicative of future success. Customers who agree to interviews may be compensated.

*Take action is defined as linking a new or existing account to a Rainy Day goal and is compared to other goals on Goal Booster. | All data as of December 31, 2023 | ¹This definition of Millennials includes all those ages 39 or younger | ²This definition of GenX includes those ages 40-54 | ³This definition of Boomers includes those ages 55 and above