



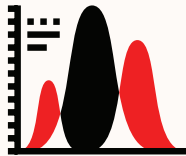
# INVESTING CLASSROOM DELUXE™

ATTRACT, BUILD AND CULTIVATE DEEPER RELATIONSHIPS

## EMPOWERING & ENGAGING CLIENTS TO INVEST CONFIDENTLY

The Investing Classroom DELUXE™ is a powerful platform that recommends learning topics, tracks learning progress, and rewards users for course completion. Users of this powerful e-learning platform consistently demonstrate significant improvement in their financial knowledge, attitudes and behaviors, leading to more confident and engaged investors. The Investing Classroom DELUXE™ includes FINRA compliant content that is engaging, unbiased and independent for beginner to advanced investors.

## PERSONALIZED FINANCIAL EDUCATION WITH MEASURABLE OUTCOMES



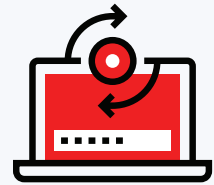
### COURSE RECOMMENDATION

The program tracks participant progress and suggests new learning tracks based on results and previous courses.



### GAMIFICATION

The gamification learning process is customizable. We use quizzes, tools, points, and badges to keep participants engaged.



### TURN KEY INTEGRATION

Seamless integration through Single Sign-On and powerful API, customized to your brand for a complete user experience.

## PROVEN FORMULA FOR SUCCESS

The Investing Classroom Deluxe™ empowers financial service firms to Attract, Build, and Cultivate deeper relationships with their clients. Built on proven academic and organizational research, our solution has demonstrated its ability to help participants of all backgrounds to improve their financial wellness for over a decade.

### MOBILE RESPONSIVE

Mobile responsive design allows users access to financial education anywhere

### WORKS WITH ALL LEARNING STYLES

FINRA compliant content organized in 7 topics and up to 5 levels

### BUSINESS ANALYTICS & REPORTS

A snapshot of progress and participation

### DEDICATED SUPPORT

Implementation and ongoing program support

### CONTEXTUAL MESSAGING

Allows clients to cross link from classroom content to other tools, resources or actions

### DATA SECURITY & PRIVACY

Confidential and private

**SEE HOW IT WORKS - REQUEST A DEMO**