

# Your nextgen's path to financial wellness.

Your path to more insights.



Your partners want more from you.



**pocketnest**™  
For Benefit Providers

**74%** of employees say it's important for employers to offer financial wellness<sup>1</sup>

**78%** of employees with high financial stress say they're distracted at work<sup>1</sup>

**5X** employees are five times more worried about finances than physical, mental, and social health<sup>2</sup>

## ABOUT

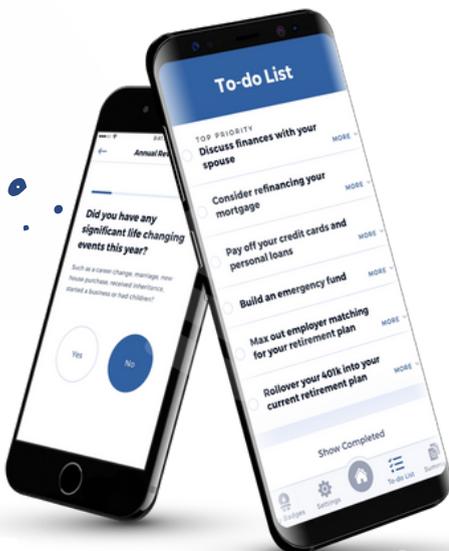
A white-label digital platform providing holistic financial wellness for your users and insights and data for you.

## MISSION

To empower and educate people to take ownership of their finances through better relationships with you.

## APPROACH

We license our platform to financial firms like you to understand, reach, and serve nextgen users.



Using behavioral science and psychology, we coach users to achieve financial wellness. Users get easy, actionable and customized to-dos. And you get more qualified leads and cross-sell opportunities—in far less time.

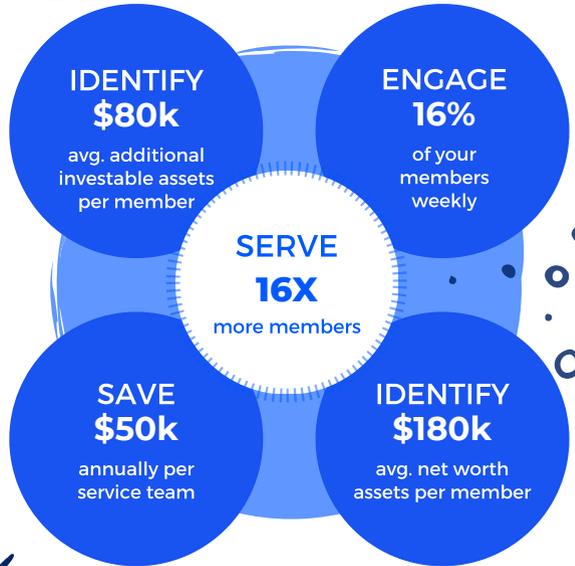
<sup>1</sup> Morgan Stanley Financial Health Network, 2018  
<sup>2</sup> MetLife Employee Benefits Survey, 2020

Let's make personal financial planning better, together.  
Bring our platform to your partners at [Pocketnest.com](https://pocketnest.com).

[hello@pocketnest.com](mailto:hello@pocketnest.com)

## DEEPEN RELATIONSHIPS

Use our User Insights Panel to **access invaluable user data** to get a complete picture of your users' finances. Quickly mine for qualified leads and cross-sell opportunities. Find what your users need from you—and when. And, most of all? **Deliver a better user experience.**



Behavioral Filter	Michael Scott	User since: 3/26/2020	Last login: 9/24/2020	View user Summary
User Traits	Angela Martin	User since: 2/27/2020	Last login: 3/2/2020	View user Summary
Net Worth Estimate	Dwight Schrute	User since: 3/2/2020	Last login: 3/2/2020	View user Summary
Estimated Budget	Kevin Malone	User since: 3/2/2020	Last login: 3/3/2020	View user Summary
Debt	Phyllis Vance	User since: 3/2/2020	Last login: 3/2/2020	View user Summary
Insurance	Meredith Palmer	User since: 3/2/2020	Last login: 3/2/2020	View user Summary
Retirement	Jim Halpert	User since: 3/2/2020	Last login: 3/2/2020	View user Summary
Investments	Stanley Hudson	User since: 3/2/2020	Last login: 3/2/2020	View user Summary
Estate Planning	Kelly Kapoor	User since: 3/2/2020	Last login: 3/2/2020	View user Summary
College Savings Plans	Jan Levinson	User since: 3/2/2020	Last login: 3/2/2020	View user Summary
Tax Profile				

## SEARCH AND FILTER

user data for quick, easy and obvious cross-sell opportunities.

## EMPOWERED AND SECURE



Empower your users to see a complete picture of their finances. All data transmissions are secured using **256-bit encryption**. All Pocketnest passwords are stored securely, and we **never store users' financial institution login information or data**. We can never generate financial transactions. Ever.