



What you make



What you spend



What you own



What you owe

When it comes to money, having a plan with
a few simple steps will get you
where you want to be



It all adds up



Sum180 is an online financial wellness service so **powerfully simple** that users are immediately ready to take action.

Financial Wellness Helps Reduce Financial Stressors

Financial concerns are a major stressor that can lead to absenteeism and lost productivity in **15%** of employees

Addressing them drives engagement, productivity and success by as much as **\$400** per employee

Improves loyalty and connection and can positively impact as many as **50%** of employees

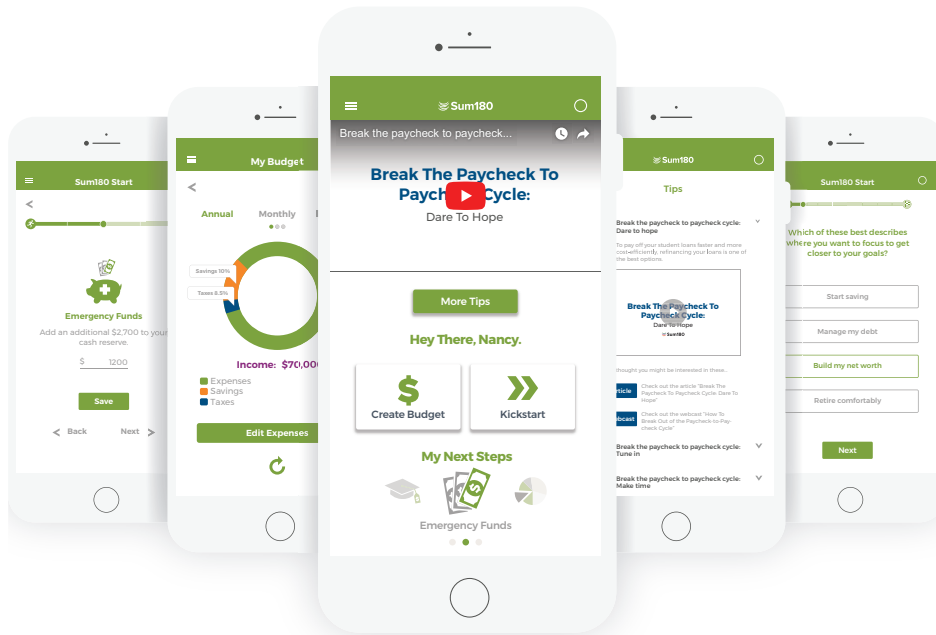
What Employees Want

No Jargon | **56%** of employees wish the financial resources offered by their company used “friendlier language”, and **36%** say they are intimidating to use

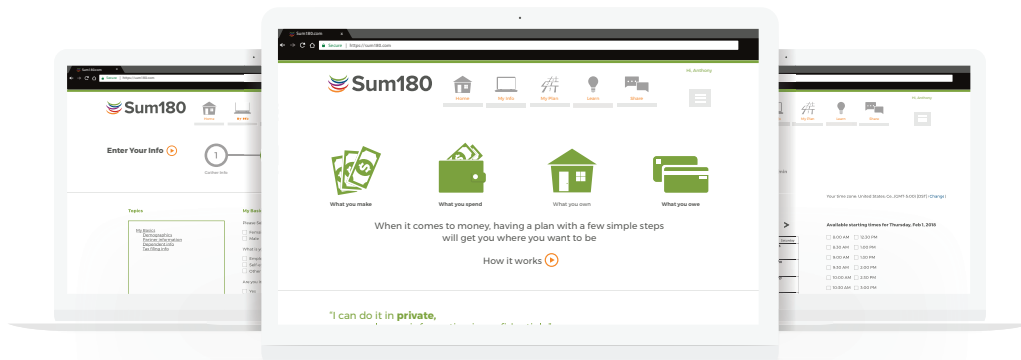
Private | **60%** would not want their coworkers to know if they were to participate and **45%** would not want their company to know. **49%** would prefer a web-based tool

Enough To Retire | 1 in 3 Americans has saved \$0 for retirement, and another **23%** has saved less than \$10,000

User Experience



We've created an online space **made for everyone**, that starts where you are, provides three clear Next Steps, and encourages positive action through gamification.



www.Sum180.com

As seen in:



The Sum180 Difference

Comprehensive

Sum180 addresses each component of your financial picture by taking charge of what you Make, Spend, Own, and Owe.

Personalized

Next Steps are 100% individualized and delivered in batches of 3 as to not overwhelm you.

More Than Education

You don't need a finance degree to take steps in the right direction. Sum180 provides a path forward with tips, advice, and support.

We Don't Score

We mean it! You will never receive a score card from Sum180. We're simply here to help get you where you want to be.

Support On Demand

Join our online community to share and learn with other users. Consult an adviser, when you are ready.

Making Change



Friends (Community)

- You are not alone
- Learn from others
- Share when you're ready



Feedback (Accountability)

- Clarity
- No judgment
- Track progress



Fun (Mastery)

- Accomplishments
- Encouragement
- Celebrate

What Sum180 Users Are Saying...

“ I can do it in **private**,
plus my information is confidential ”

“ **I finally know** where I stand ”

“ I'm **doing better** than I thought... ”

“ It's **realistic** ”

“ Life transitions can be scary,
Sum180 helped me move forward. ”

Because, when it comes to money, everyone
deserves a simple plan to help them
live better, now and in the future.

To learn more, please contact:

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