FinPath

Program Success Guide

Everything you need to help your staff
begin their journey to **financial wellness.**

www.finpathwellness.com

finpath™

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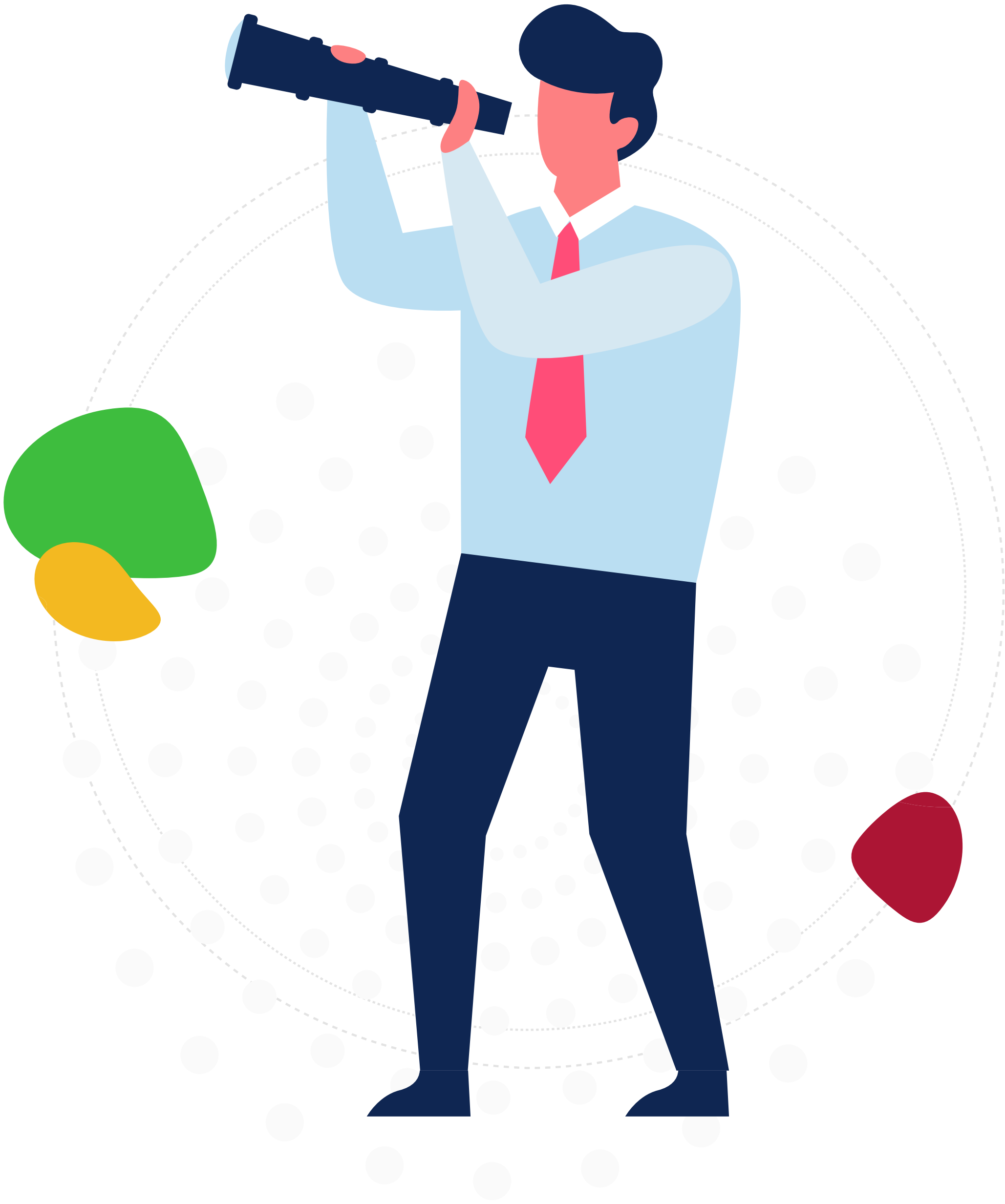


Welcome Aboard!

We're happy you're here.

A majority of Americans - roughly 73% - rank finances as their #1 stressor. Financial stress can be debilitating, both for those who have good financial habits and those who don't.

FinPath is here to change that.

With FinPath, our mission is to provide solutions that help empower individuals to go from **barely surviving to wholly thriving.** Since our founding, our calling is to promote personal financial success in three simple ways: certified Financial Coaches, education, and strategic solutions.

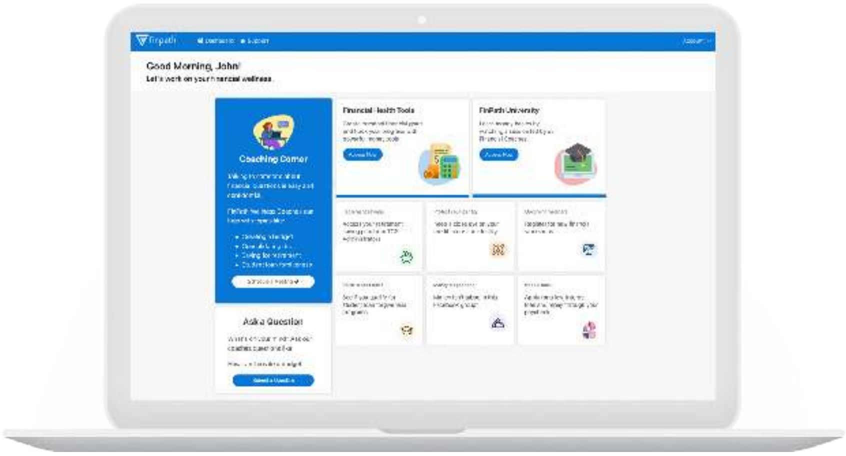
Our team strongly believes that the best approach to financial wellness is through continuous education and active engagement with Financial Coaches. Not only do they bridge the gap on complex topics, but they help individuals understand how significant each financial decision can be.

In this guide, you will find everything you need to make this program a success and entrust your staff toward financial well-being.

We look forward to the journey ahead.

About FinPath

FinPath is an employer-paid financial wellness program designed to help you take control of your money. If you've ever felt like you can do more with your dollar, FinPath can help with its trusted financial coaches and powerful online financial health tools.



Certified Financial Coaching

FinPath University

Financial Health Tools

Program Perks

Areas of Focus

Emergency Savings

From day one, we work hard to help individuals prepare for the next financial shock with a solid emergency savings strategy.

Budgeting & Spending

Financial success doesn't require a lot of money—it just requires a little extra planning. We help give each dollar a purpose.

Debt Management

Piling debt can make it hard to move forward. We help explore potential debt forgiveness options and create a plan to pay down debt.

Credit Score Improvement

Credit worthiness is crucial to financial success. We work to identify areas of opportunity to improve credit scores.

Smart Borrowing

If faced with an emergency expense, payday loans and pulling from retirement savings is often the answer. We provide a better alternative.

Security & Protection

No plan is complete without protection. We help identify areas of need and encourage individuals to seek coverage.

Contacts

Throughout your time with FinPath, our teams will communicate extensively. To make sure you're contacting the right person, we have detailed below a list of contacts in order to maintain program success.

For Us

Wellness Coordinator:______________________________

This is the point of contact for our team on check-ins, program and platform updates, semi-annual Participation Report meetings. This person will also work with our team on planning new initiates, coordinating engagement activities and will be the Brand Ambassador for the Financial Wellness Program in your organization.

Accounting Department:______________________________

Will receive the initial W9 form and annual invoices.

HR Director:______________________________________

Included on participation reports, meetings and emails, if requested

For You

Customer Service: (833) 777-6545

Matt Escalante
Senior Director
(512) 600-5261

Antonieta Amendolara
Wellness Coach Team
Lead (512) 600-5294

Javier Zamora
Client Success Manager
(512) 600- 5355

Claire Bendtschneider
Communications Specialist
(512) 600- 5347

▢ Tech Requirements

There are a few tech requirements to ensure FinPath is running smoothly on your devices. This list was created for your technology team, and it contains all the information you need for Whitelisting our communication channels. If your organization has any type of spam filter enforced, participants may not be able to receive their activation code to register their account, nor will they be able to receive any other communications or updates.

1 Mbps average internet connection speed per user

Web Browser

» Microsoft Edge
» Microsoft Internet Explorer 11
» Mozilla Firefox (Version 39+)
» Google Chrome (Version 43+
» Safari (Version 7+)

Mobile Browser

» Android 4.0+
» iOS 7+ Safari

Cookies enabled

JavaScript enabled

Flash enabled

ZIX

» 63.71.13.0/24
» 63.71.14.0/24
» 63.71.15.0/24
» 199.30.236.0/24
» 91.209.6.0/24

TCG (public IP)

» 43.131.100.66

Domains

» @tcggroupholdings.com
» @finpathwellness.com
» @tcgservices.com

Email Delivery IPs

» ip4:199.255.192.0/22
» ip4:199.127.232.0/22
» ip4:54.240.0.0/18
» ip4:69.169.224.0/20
» ip4:76.223.180.0/23
» ip4:76.223.188.0/24
» ip4:76.223.189.0/24
» ip4:76.223.190.0/24

Eligibility File Information

SSN	The social security number should be formatted without dashes and should include leading zeros.
Last Name	Up to 30 characters
First Name	Up to 30 characters
Middle Name	Up to 30 characters
Address	Up to 50 characters for the street address and apart-ment/unit number
City	Up to 20 characters.
State	2 character state abbreviations
Zip Code	5 characters or 10 characters with dash
Marital Status	Up to 1 character
Gender	Up to 1 character
Race	Up to 30 characters
Phone	10 character phone number including the area code
E-mail	Up to 50 characters
Birth Date	MM/DD/YYYY
Hire Date	MM/DD/YYYY
Rehire Date	MM/DD/YYYY
Termination Date	MM/DD/YYYY
Job Position	Up to 30 characters
Gross annual Income	Up to 9 characters (no decimals)
Payroll ID	Up to 10 characters
Supplemental Benefits Eligibility	(Y/N)

The information listed in the Eligibility specifications is there in order to make the user experience the best it can be. Providing this information ahead of time will not only create a better user experience for your employees, but it also gives our Financial Coaches the the opportunity to help the users make better decisions on their personal finance goals. The Participation Reports will also use the demographic information gathered from this data file to segment your employees and understand the different needs of the niches within your organization.

The ongoing eligibility file should contain one record (one row) for each employee and one column for each required field. All eligible employees should be included on the Eligibility File. The required fields are on the left.

Naming preference: file type, date posted (ex. Eligibility file - 6.30.2018).

File Type: CSV

*All fields are required.

**If you have employees with identical payroll frequencies on separate schedules, we suggest adding a number after the letter (i.e. M1 for monthly employees paid on the first of the month, M2 for monthly employees paid on the 15th of the month).

Launch

Let's get the show on the road.

The most important element to a successful launch is buzz. Without buzz, your employees won't know about this great new benefit available to them. Because the most successful programs are the ones we are able to work with closely, we have developed a variety of content to support the launch of your program. We have also developed a launch timeline for you to track engagement, which is featured below.

Launch Timeline

Pre-launch Email

- FinPath is coming soon
- Can be sent by employer or FinPath

Video from Leader

- Video of organization leader describing the new benefit

Launch Email

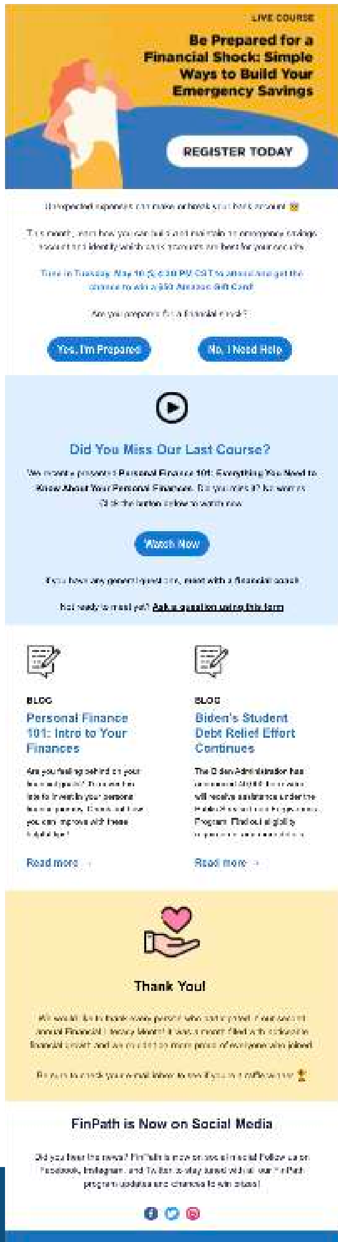
- Review of key benefits
- Instructions for registering/setting up account
- Personal URL included

Post-launch Email

- Sent 5-7 days after launch to employees who haven't responded yet
- Reminder to take advantage of FinPath

Town Hall Invitation

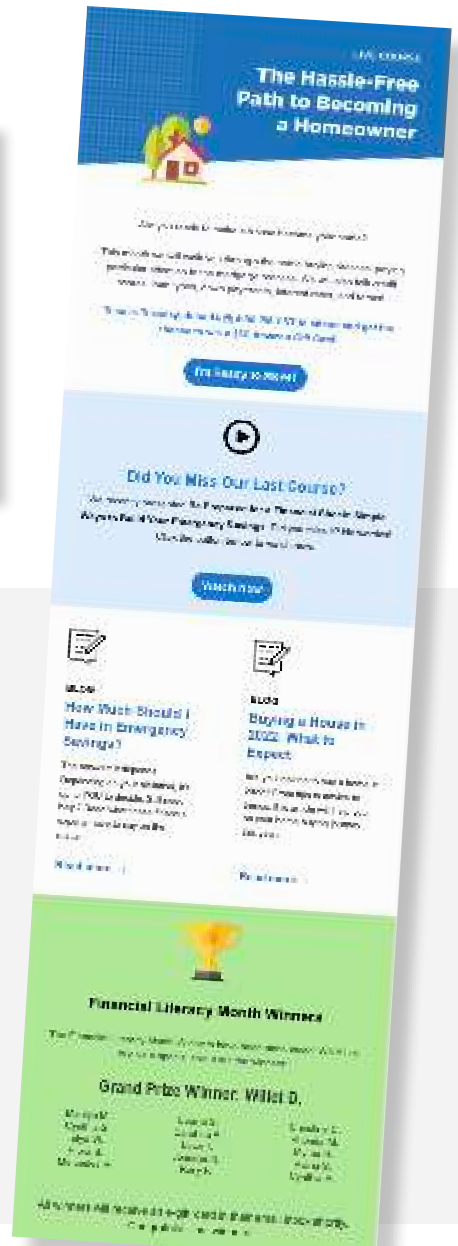
- Sent 2-4 weeks after launch
- Invitation to attend live online event
- Q&A and review of features and benefits

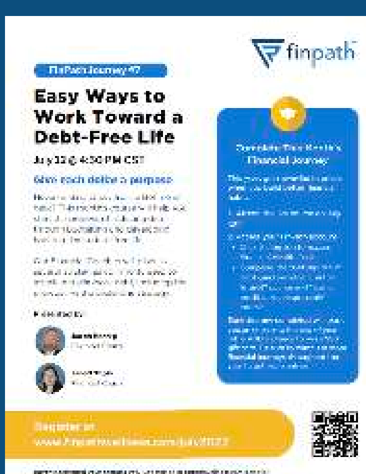


Post Launch

Taking the reins

With every FinPath registration, post launch materials will be provided. This includes a monthly newsletter and the monthly FinPath Journey flyer, as well as a host of engagement activities to keep communication steady.





Engagement Activities

Digital Media

- Email Announcements
- Social Media Posts
- Newsletters

Traditional Media

- Break Room Posters
- Mailbox Flyers
- Postcards

You care about the well-being of your employees; we wouldn't be here if you didn't. We want to ensure we are keeping your employees engaged in the program. It can be a diffcult job keeping track of who or who isn't engaged, so we created, improved, and *recreated* a number of different ideas for your employees to stay active in the program. This page will give you a variety of activities to choose from.

Automated Engagement

- Post-Registration Email Campaign
- Monthly Newsletters
- Monthly Live Courses hosted by our FInancial Coaches and other industry specialists
- $1000 Grand Prize

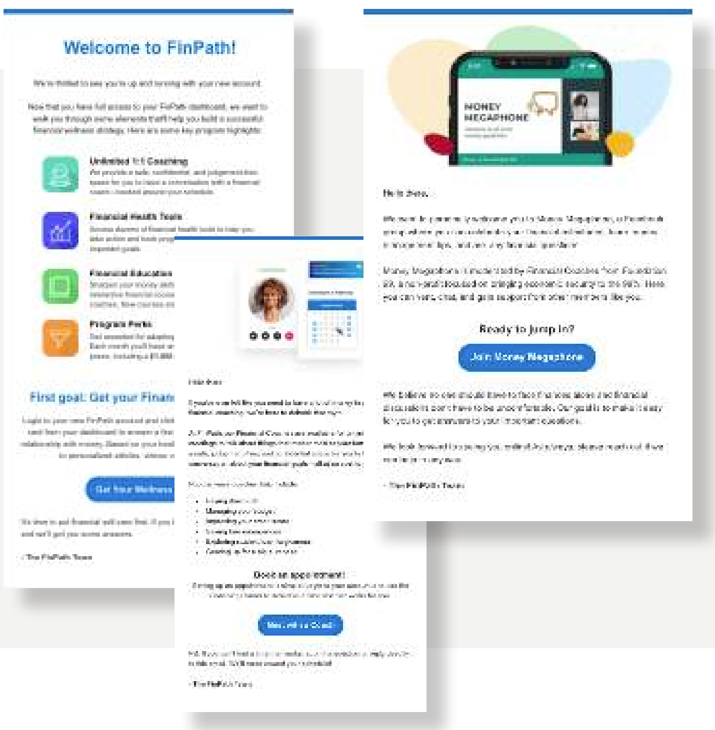
Scheduled Engagement

- Intro Presentation
- Incentives and Contests
- Additional activities are available upon request
- Benefit Fairs
- Employee Training Days
- Health/Wellness Initiatives/Events

Welcome Kit

Integration at its finest

With every FinPath launch, a drip campaign will be sent to encourage new users to the portal. The emails, nine total, are sent over the course of a year. In the first week, recipients are encouraged to access the portal: Financial Health Tools, FinPath University, Coaching Corner, Money Megaphone, and the array of strategic solutions.



Day 1: Welcome email

Day 2: Coach email

Day 7: FinPath Tools

Day 15: FinPath 1:1 Coaching

Day 21: FinPath University

Day 28: Money Megaphone

Day 45: Survey

Day 183: 6-month celebration

Day 365: Anniversary message

facebook.com/finpathwellness
@finpathwellness

instagram.com/finpathwellness
@finpathwellness

twitter.com/finpathwellness
@finpathwellness

Follow FinPath on Social Media

As part of the Welcome Kit, keep in touch with FinPath by adding us on social media! We post weekly updates about upcoming events, program features, and ongoing incentives.

Client Success

Learning more about what financial burdens and stressors your employees experience every day can help you make better decisions about the benefits that would help them the most. Together, we can identify new opportunities to improve financial wellness with the Client's Statute of Success. This is a combination of progress reports for your organization that will provide you pertinent information about adoption and progress of FinPath.

Statute of Success

- Quarterly meetings
- Email health
- User activity
- Reporting
- Aggregated financial coaching sessions results
- Participation rates
- Learning module activity
- List of most popular topics
- Health score trend analysis

Reporting will not only offer insight into employee behavior, but it will ensure that your organization achieves success out of the program.

Important Disclosures

FinPath is offered through RPW Solutions. HUB International, owns and operates several other entities which provide various services to employers and individuals across the U.S.

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900 S Capital of Texas Hwy, Suite 350 Austin, TX 78746

833-777-6545

www.finpathwellness.com