

THE EDUCATED INVESTOR UNIVERSITY

is an online, financial learning program with over 50 hours of interactive, easy-to-understand content on topics related to Personal Finance, Investing Basics, and Retirement & Wealth Management.



Built by financial institutions for financial institutions

The Educated Investor University was designed by Precision Information, LLC in collaboration with over 30 financial executives with the employee and customer in mind —making it an efficient, effective, and easy-to-use financial learning program.

DISCOVER THE BOTTOM LINE BENEFITS OF FINANCIAL EDUCATION



Features & Benefits

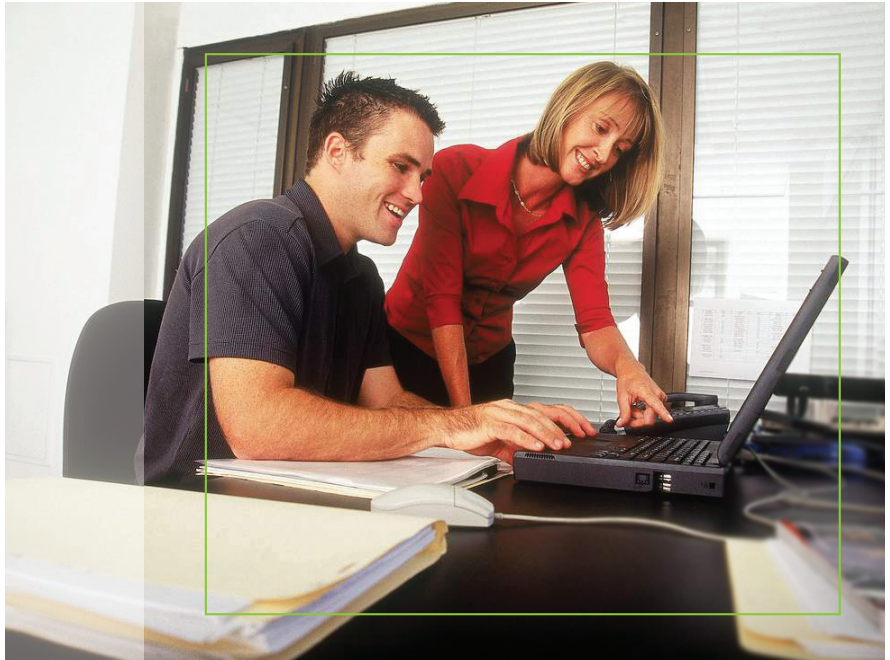
- 50 hours of unbiased, accurate, easy-to-use content in three programs: Personal Finance, Investing Basics, and Retirement & Wealth Management.
- One to two hour courses, broken into three to five 15-20 minute modules, make the information approachable and easier to retain.
- Interactive tools and questions to help students build confidence and reinforce that they are grasping key concepts.
- Educated Investor “Quick Tips”, charts and graphics break up text and make learning fun and informative.
- Instant, online access enables students to take courses at work, at home or while traveling.
- Track progress while you work and bookmark where you left off so you can schedule your learning around your work day, not the other way around
- Student information can quickly and easily be downloaded into the system using Excel, making administrative set-up fast and simple.
- Simple, straightforward reporting system enables administrators to quickly and easily track student progress.
- Brandable interface ensures your employees associate this benefit with your institution.

Nearly 90% of employees who used the Educated Investor University said they would be more likely to refer the products they studied to customers.

Improve your sales and service culture

An Educated Investor University financial education program for your employees will increase your staff’s referral power by giving them the financial *knowledge* they need to recognize opportunities and the *confidence* they need to take action.

- After completing Educated Investor University coursework, 94% of employees said they felt more knowledgeable about the subject and nearly 90% said they would be more likely to refer the products they studied to customers.
- Just a small number of qualified referrals per month can add thousands of dollars to the bottom line.



Increase employee satisfaction and retention by improving their financial knowledge

- **Improve satisfaction:** A financially confident employee is a happier, more satisfied employee.

Improved financial well being through financial education can increase employee productivity by \$700 to \$2000!

- **Increase retention:** Improve your employees’ lives by increasing their personal finance know-how and watch your retention rates grow.
- **Improved productivity:** Research shows that the combined impact of better financial education on employee behavior and well-being can result in a gain to the employer of \$700 to \$2,000—for every employee, every year!

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Pricing Programs

We have a flexible package that meets your needs and budget:

- **A la Carte** – Pick and choose the courses used in your education program
- **Enterprise Plan** – Gain complete access for every employee to every course available in the Educated Investor University

For more info, contact our sales representatives:

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