SensibleU

Building Loyalty with Future Generations

It is crucial for financial advisors to deepen relationships with clients and their families to mitigate potential losses during the transfer of wealth. It is also more important than ever for advisors to build loyalty with the next generation and position themselves to gain new business. SensibleU was built to help financial advisors:

- Mitigate the potential business loss from the **next generation's transfer of wealth**.
- Create meaningful **client engagement** opportunities at scale.
- Provide additional tools for **client acquisition.**
- Position yourself as a **trusted source of financial education** for the whole family.

Powered by EverFi, the nation's leader in critical skills education, *SensibleU* is a digital engagement platform designed to help Financial Advisors connect with the next generation. With *SensibleU*, Financial Advisors are able to provide clients, prospects and their families with access to a series of age-appropriate, interactive financial learning courses designed for Grade School, Middle School, High School, College and Adult learners. Establish yourself as a trusted resource for the whole family with *SensibleU*.

What You'll Get:

- Unlimited access to share the courses with your clients and prospects.
- A personalized advisor dashboard where you can track invitations sent, enrollments, user progress through courses and more!
- Program marketing and support materials to share with clients.

Annual License Fee:

- Individual License (for one financial advisor): $500/yr.
- Team License (for up to four financial advisors): $1,000/yr.

To register visit: irionline.org/sensibleU

$59 Trillion

will transfer from Baby Boomers to their heirs over the next four decades[1]

90%

of prospective heirs change wealth advisors once they receive their inheritance[2]

Only 33%

of parents talk to their kids about money regularly[3]

40%

of adults gave themselves a grade of C, D, or F on their knowledge of personal finance[3]

69%

of children/heirs do not have a relationship with their parents' financial advisor[4]

Vault—Understanding Money

Level: Grade School

LENGTH: 2.5 HOURS

Vault is an interactive course designed to teach financial literacy skills early in a child's cognitive development. Saving, budgeting and earning money may not be top-of-mind for most preteens, yet the financial knowledge they gain now will set the tone for the decisions they make in their future.

EverFi—Financial Literacy

Level: High School

LENGTH: 6 – 8 HOURS

The EverFi course leverages video, animations, 3-D gaming, avatars and social networking to bring financial skills to life for today's digital generation. Users will complete numerous interactive activities that include creating a diverse investing portfolio and navigating the stock exchange.

Transit—Financial Wellness

Level: College

LENGTH: 1 – 2 HOURS

The Transit course is designed to help empower college students with the skills to understand their finances and successfully transition in and out of the college experience. With a highly personalized, self-paced, interactive experience, users learn key financial decision-making skills and apply their learning in real-life scenarios.

EverFi@Work

Level: Millennials and Adults

LENGTH: 5 – 10 MINUTES PER TOPIC

The EverFi@Work course is designed to empower millennials and adults with the skills they need to help manage their personal finances and successfully plan for their future. It is also useful for adults who may not have a lot of experience in managing their own money and need a refresher on topics relevant to their life stage.

Venture—Entrepreneurship

Level: Middle and High School

LENGTH: 1.5 – 2 HOURS

The Venture course is an immersive and interactive experience focused on teaching fundamentals of business and entrepreneurship. Users learn important skills in finance, marketing, team-building and market research to help them think entrepreneurially about business and life. The module requires users to innovate and problem-solve, teaching tangible business skills that are critical for careers of the future.

Questions or Feedback?
Email sensibleusupport@everfi.com
or call (866) 288-7919

[1] *Boston College Social Welfare Research Institute*
[2] *Pershing 2011 Study*
[3] *The National Foundation for Credit Counselling/ The Network Branded Prepaid Card Association, The 2013 Consumer Financial Literacy Survey*
[4] *U.S. Trust Bank of America Private Wealth Management, 2014 U.S. Trust Insights on Wealth and Worth®, Annual survey of high-net-worth and ultra-high-net-worth Americans*

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