About Us

Non-Profit

• Trusted by working families
• Established since 2001
• Thought leader

Fintech

• Direct-to-consumer product reaching over 200,000 people
• Scalable, secure platform
About our Savers

- **82% Women**
- **$32,000 average income**
- **87% do not have a college degree**
- **64% single parents**

Members’ Sources of Income

- Other/Multiple: 29%
- Not earning any income: 18%
- Disability Benefits: 17%
- Full-time: 20%
- Part-time: 14%
- Multiple part-time jobs: 1%
- Self-employed: 0.4%
Changing Savings Behaviors

LEARNING
Financial Content

• >100 articles and videos by certified financial coaches
• Points for interacting with content

DOING
Savings Challenges

• Incentives and prizes
• Nudges
• Social proof

Race to 500
YOUR SAVINGS CHALLENGE
Savings Dashboard

Key Metrics (Aggregate)

**Growth**
- Sign-Ups
- Linked Accounts

**Demographics**
- Income
- Age
- Household size
- Geographic heat map

**Savings**
- Average saved
- % saving at least $20/mo
- % who have increased saving since sign-up

**Financial Health Score**
- Saving
- Spending
- Borrowing
- Planning
I'm just amazed how SaverLife really helped me. One program out of the many that I've tried - this was the one that kicked down the door for me. – Lawreece, CA

I hadn't been shown how to save, and it wasn't part of my life before. I had feelings of shame and guilt, not knowing how to do this. Now I know it's not as hard as I thought. – Alaina, WA

“This is just what a good employer should do.” – Debbra, store manager in CA

“Since launching with SaverLife Solutions, we've empowered Levi Strauss & Co.'s hourly employees to build strong financial futures at a scale we could never reach before.” – Jenny, co-lead at the Red Tab Foundation

From our Partners

From our Savers

Employer Case Study

8.3x Savings

63% opened new savings accounts

Serving employees at:

LEVI'S
HCA Healthcare
TAILORBRAND
"It really is a win-win for our members. One of the cornerstones for financial wellbeing is saving for your future. And it's also one of the hardest things to do."
-Melissa Morgan
Chief Retail Officer, Patelco Credit Union

Goals
• Increase savings rates
• Use of new auto-savings feature
• Member satisfaction and participation