



Worried About Future College Costs or Current Student Debt?

Our company now has the most powerful benefit to save for college or pay off student debt – **SavvyFi**.

SavvyFi Supercharges Your Education Savings



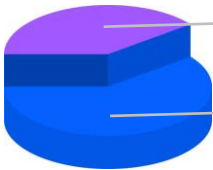
Easy Gifting



Cashback Rewards

Look How Much More SavvyFi Members Save

For every:
\$10
saved



\$4 Came from other sources

\$6 Came from family savings

Designed for All Employees



Parents

Individuals with Student Debt



Grandparents, Aunts & Uncles, Godparents



Scan Me to Enroll!



Frequently Asked Questions

How does SavvyFi help me save for a loved one's college?

SavvyFi is a digital web application that allows you to easily save for a loved one's education with a 529 plan. Our unique features like gifting and cashback rewards help you look forward to a future without educational debt.

How does SavvyFi help me pay down my student debt?

SavvyFi has direct integrations into more than 90% of student loan servicers, which allows you to aggregate all of your loans in one place. Our unique features like gifting and cashback rewards help you pay down your debt more quickly, so you can move on to other financial goals.

How does the cashback rewards feature work?

You simply shop online, make purchases in-store or book travel through SavvyFi's cashback rewards program and earn up to 30% of your purchase in cashback. The cashback program covers 10,000+ merchants including major brands such as Target, Home Depot and Walmart. You can also earn with local merchants such as the neighborhood pizza shop. At the end of the month, all cashback is automatically transferred to your 529 account or student loans.

How does the gifting feature work?

In your profile, you are given a personalized link to share with others. This allows you to easily receive gifts, along with messages, and keep track of all the people who have invested in you or your loved one's education.

What is a 529 Plan?

A 529 plan is an investment account that allows savings to grow tax-free if the funds are used for qualified expenses at eligible higher education institutions. This includes expenses such as tuition, room and board, and books. Tax-free growth means you get a boost on your investment earnings that wouldn't be available otherwise.

Eligible institutions include four-year universities, community colleges, trade schools, and private K-12 schools. Qualified expenses typically cover most costs associated with attending school. Learn more at: <https://savvyfi.co/what-is-a-529/>

What happens to the 529 plan if my priorities change?

If you do not want to use the money for a student's education, you have many options. You can transfer the 529 account to another family member, use the funds for your own education, or withdraw the funds with a 10% penalty on only the earnings to give your student a head start on other important financial goals.

