Savology

USER FEATURES

	Standard	MOST POPULAR Advanced	BEST VALUE Premier
Onboarding financial survey	✔	✔	✔
Personalized action items & activities	✔	✔	✔
Comprehensive financial report card	✔	✔	✔
Printable plan or plan summary	✔	✔	✔
Retirement calculations & projections	✔	✔	✔
Savings rate & debt-to-income tracking	✔	✔	✔
Net worth composition & tracking	✔	✔	✔
Core planning modules	✔	✔	✔
Literacy courses & assessments	✔	✔	✔
Basic gamification	✔	✔	✔
Financial duress score & factors	✔	✔	✔
Social financial comparisons	✔	✔	✔
Risk Tolerance score & factors	✖	✔	✔
Free guardianship nominations	✖	✔	✔
Account aggregation add-on*	✖	✔	✔
Live chat add-on*	✖	✔	✔
Credit score add-on*	✖	✔	✔
Integrated employer benefits*	✖	✔	✔
	$99	$149	$199

ADMIN FEATURES

	Standard	MOST POPULAR Advanced	BEST VALUE Premier
Basic user groups	✔	✔	✔
Unlimited base users	✔	✔	✔
Custom planning assumptions	✔	✔	✔
Remove courses, modules, action items	✔	✔	✔
Firm bio information & disclosures	✔	✔	✔
Individual advisor bios	✔	✔	✔
Activity metrics & reporting	✔	✔	✔
User activity notifications	✔	✔	✔
Admin help center	✔	✔	✔
Remove Savology providers	✔	✔	✔
White-labeled platform option	✖	✔	✔
User audiences & exports	✖	✔	✔
Bulk activities & activity templates	✖	✔	✔
Employer, & prospecting groups	✖	✔	✔
Custom product providers	✖	✔	✔
Linked content resources	✖	✔	✔
Advanced admin roles	✖	✔	✔
Zapier API integration	✖	✔	✔
	$99	$149	$199

ADMIN FEATURES

	Standard	Advanced (MOST POPULAR)	Premier (BEST VALUE)
Custom user add-on package	✗	✓	✓
Employer branded platform*	✗	✓	✓
Employer specific benefits*	✗	✓	✓
Employer administrative access*	✗	✓	✓
Employer activity & wellness metrics*	✗	✓	✓
Separate employer org settings*	✗	✓	✓
Dedicated account manager	✗	✓	✓
Preferred firm for Savology referrals	✗	✗	✓
Premium employer organization	✗	✗	✓
Unlimited user groups	✗	✗	✓
Account aggregation for 100 users	✗	✗	✓
	$99	$149	$199

Interested in learning more?

Visit us:
savology.com/advisors

OR

Email us:
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