

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*	✗	✓	✓

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	✗	✓	✓

ADMIN FEATURES

	Standard	MOST POPULAR Advanced	BEST VALUE Premier
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	✗	✗	✓

Interested in learning more?

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