

## Financial wellness for the 100%



### 1-ON-1 FINANCIAL ADVISORS

Work together to develop a custom action plan



### PERSONAL FINANCE TOOLS

Track progress and take action on financial goals



### TOTAL COMPENSATION TOOLS

See how employer benefits can support life goals



### AI ASSISTANT TRAINED BY CFP®s

Leverage AI for 24/7 support

Northstar is a financial wellness program that helps employees make the most of their total compensation and make financial decisions with confidence.

With innovative fintech tools and a team of in-house financial advisors, Northstar helps companies increase engagement and support teams at scale during onboarding, open enrollment, equity events, and more.

### Supporting employees across life stages

- ◆ Paying off student loans
- ◆ Planning for retirement
- ◆ Investment advice
- ◆ Managing health costs
- ◆ Creating a budget
- ★ Saving for child's education
- ♥ Starting a family
- 🏠 Estate planning
- 🏠 Buying or refinancing a home
- 🏠 Understanding taxes



Northstar serves in a fiduciary capacity where employees' best interest always comes first

### Providing personalized guidance throughout the employee experience

- ✔ New hire onboarding
- ✔ Health plan selection
- ✔ ERG programming
- ✔ IPO and tender offers
- ✔ Open enrollment
- ✔ 401(k) rollover
- ✔ Deductions and taxes
- ✔ Raises and bonuses
- ✔ Equity grants and ESPP
- ✔ Pre-tax contributions
- ✔ Company acquisition
- ✔ Offboarding and transition

### TRUSTED BY EMPLOYERS ACROSS THE GLOBE OVER 60 COUNTRIES:

