



Capabilities Overview

The Modern Savings Platform Built for Advisors

Vestwell brings together technology that's 10x more efficient than legacy systems and deep expertise in retirement, workplace savings, and holistic financial wellness to enhance the way you do business.

See what you can build with Vestwell.



The unique power of Vestwell.

Thousands of financial professionals – from individual advisors to top global banks – trust Vestwell for their savings and financial wellness solutions.

Vestwell (and TPA partners) provide:

- White-labeled branded experience
- Optional TPA & ERISA 3(16) administration
- Recordkeeping, trust, and custody

With Vestwell, your firm can provide:

- Advisory services
- Integrated content and tools
- Fund management

Additional Offerings Include: Data Integrations and Managed Accounts

Vestwell by the Numbers

\$30B

Assets Under Management

1,171,742

Savers

50,000

Businesses



Integrations with 100+ industry-leading payroll providers.



Turn the unique power of Vestwell into **your competitive advantage.**

Learn how Vestwell can help you serve more clients at scale and explore strategies to add or expand your retirement plan practice.

Best-In-Class Technology

Our modern, flexible, and open architecture platform lets you custom-build your offering. You and your clients benefit from a streamlined user experience – no jargon, no complexities – that makes navigating the platform effortless. Additionally, we can integrate with 100+ payroll providers to simplify eligibility and payroll processing while taking more work off your plate.

World Class Service

Our robust service offering means you and your clients can expect frictionless service across any device. Access our portal via desktop or mobile, and reach our teams via email, our multilingual call center, AI chatbot, or our comprehensive help center.

A Trusted Partner

As you grow your book of business, our team of dedicated industry experts is in your corner, ready to support you and your clients every step of the way.



Up to
10x

more efficiency when compared to legacy providers.



90%

of service inquiries are resolved within 24 hours.



97

Advisor NPS Score*

*Based on Vestwell's platform data and survey responses.



Why advisors choose Vestwell.

Our platform becomes an extension of your firm. We continue to expand savings solutions to meet the needs of employers and employees and increase participation.

Vestwell brings a modern approach to recordkeeping.



Omnichannel Experience

Our robust service offering means you and your clients get the expert support you need, when you need it. Access our portal via desktop or mobile, and reach our teams via email, our multilingual call center, or our comprehensive help center.



Expert Guidance

Specialized administration and plan design subject matter experts in your corner.



Robust Integrations

The platform can integrate with 100+ payroll providers and new connections are continuously explored.



Open Architecture

Flexible fund universe, whether you prefer an off-the-shelf offering or building your own fund lineup or asset allocation models.



Customizable

Choose from bundled and unbundled administration, co-branding, and investment programs, including managed accounts.



Intuitive

Modern interface for seamless interactions and experiences that exceed client expectations.

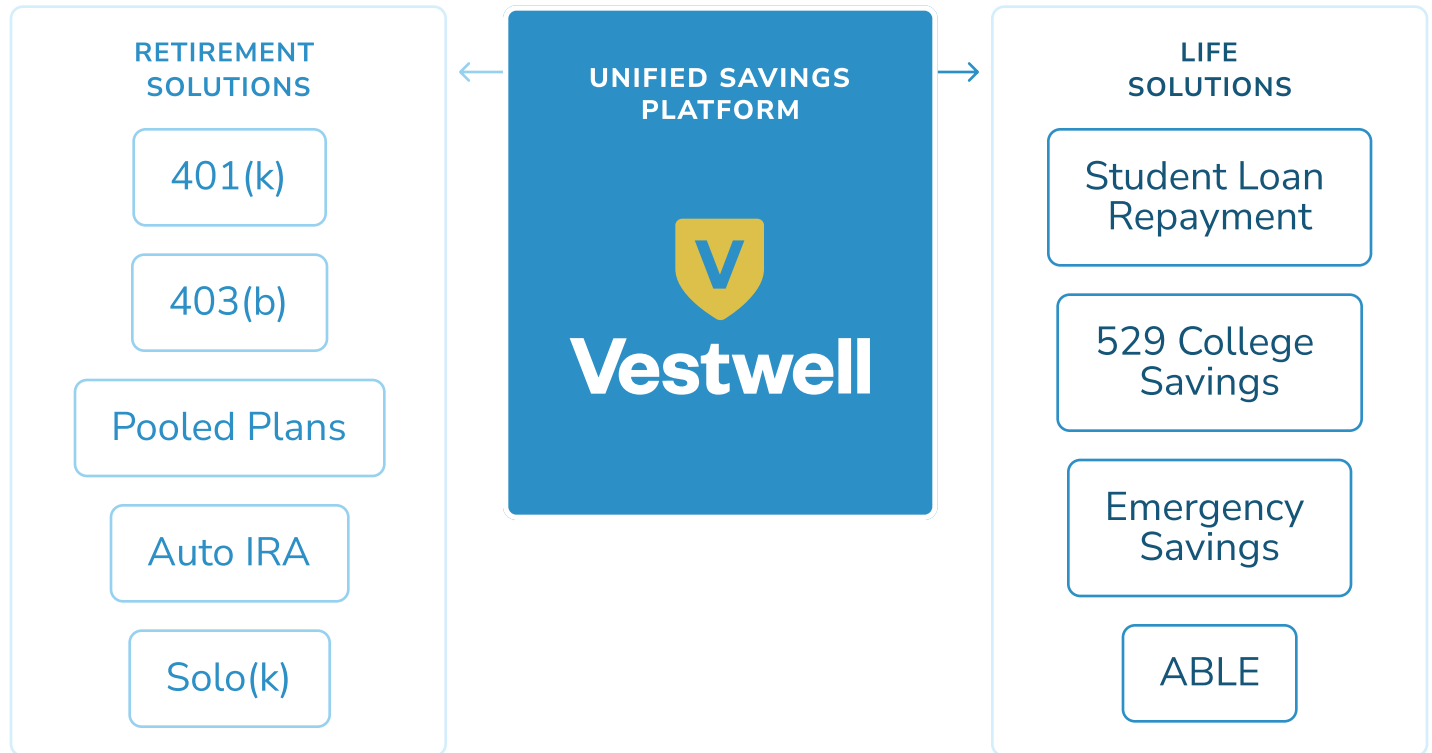


Dedicated Support

Questions? Your dedicated Client Success Manager can help point you in the right direction.



Vestwell continues to expand savings solutions to meet the needs of **financial advisors and their clients.**



With Gradifi, Vestwell enables student loan repayment and **college savings solutions.**

Equip your clients with a powerful tool to alleviate employee financial stress. Gradifi provides employers with a customizable education savings and financial wellness platform that helps employees build a brighter financial future.



**Student Loan
PayDown**

Direct employer contributions towards employees' student loans.



**College
SaveUp**

Direct employer contributions towards employees' 529 plans.



**Financial
Core**

Interactive and educational financial resources for employees.



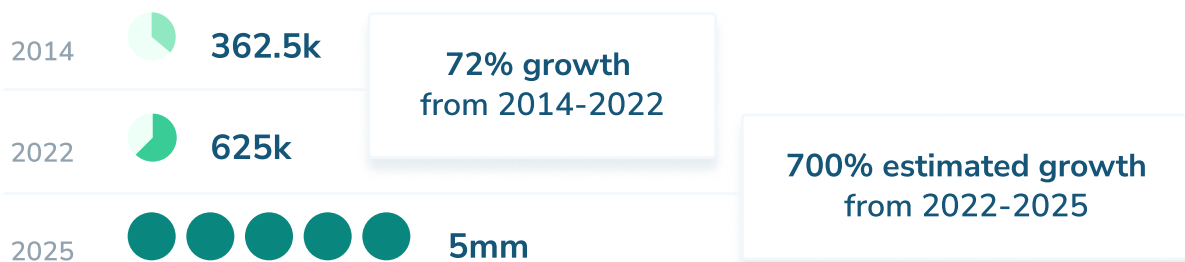
Now is the time.

As a partner, Vestwell is dedicated to helping you scale your practice, from large to small sized businesses.

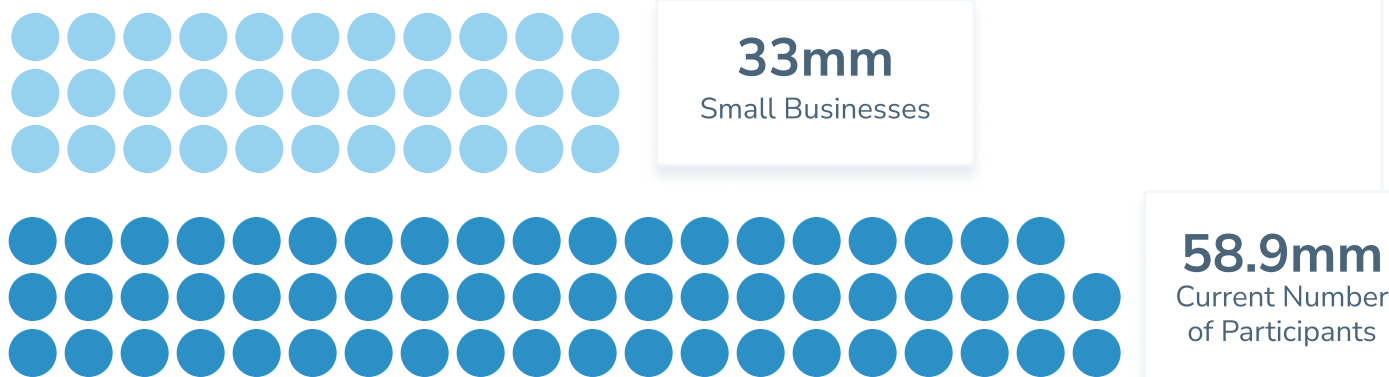
A seismic opportunity for financial advisors to drive more revenue.

Due to unprecedented growth in the small and midsize business segment, now is the perfect time for financial advisors to enter into the retirement plan market and gain a competitive edge.

Number of SMB 401(k) Plans in the US



Current Market Size



Vestwell helps advisory firms expand.

“ Our clients get excellent support from Vestwell, and it has really allowed us to scale. ”



Zach Stein

Co-Founder & Chief Investment
Officer, Carbon Collective



Find out how Vestwell helped Carbon Collective **enhance their client experience and grow their retirement business.**





Ready to get started?

Connect with Vestwell | sales@vestwell.com.

