

The BALANCE Financial Wellness Center

A financial education platform featuring everything your financial institution needs to improve the financial health of those you serve.

The BALANCE Financial Wellness Center is a financial education platform that gives you the tools to empower lives and make a meaningful impact. Our turnkey platform features 21 eLearning modules, quizzes, videos, articles, podcasts, calculators, an online budgeting program, toolkits, home-buying modules, and checking account management instruction, all integrated into a website branded for just for you.

The BALANCE Financial Wellness Center also includes monthly updates, marketing material, and free webinars. It all adds up to the most comprehensive financial education experience available.

Features	Inform	Insight	Immerse	IQ
Co-branded website (with logo and contact info)	X	X	X	X
eLearning modules	4	10	21	21
New media resources: - Articles - Podcast - Videos - Calculators - Downloadable toolkits & booklets	X	X	X	X
Monthly article content subscription	X	X	X	X
Monthly member webinars	2	2	2	2
GetInBalance Online checking account education program	—	—	X	X
MyBalance Online money management tool	—	—	X	X
Pathways to Homeownership Online first-time homebuyer education module	—	—	—	X
Marketing materials	—	Free PDFs	Free PDFs	Free PDFs & discount printing
BALANCE Partner Pass Discounts on Webinars, Workshops and Training Academy sessions	—	X	X	X

BalanceTrack eLearning Tiers

Modules	BalanceTrack Inform	BalanceTrack Insight	BalanceTrack Immerse	BalanceTrack IQ
Money management	X	X	X	X
The road to homeownership	X	X	X	X
Drive away happy	X	X	X	X
Credit matters	X	X	X	X
The psychology of spending	—	X	X	X
Repaying student loans	—	X	X	X
Financial first aid	—	X	X	X
Smart tax planning	—	X	X	X
The basics of investing	—	X	X	X
Teens and money	—	X	X	X
High-cost of financial services	—	—	X	X
The world of credit reports	—	—	X	X
Checking account management	—	—	X	X
Financial planning	—	—	X	X
Ten steps to financial success	—	—	X	X
Using home equity	—	—	X	X
Rebuilding after a financial crisis	—	—	X	X
Identity theft	—	—	X	X
Finances for college students	—	—	X	X
Cash flow	—	—	X	X
The art of saving money	—	—	X	X