



# Help employees tackle education expenses with ease.

From large tech companies to your local doctor's office, businesses nationwide trust us to power their education benefits programs.

## 640+

companies offering our education savings solutions<sup>3</sup>

## \$300M+

student loan contributions<sup>3</sup>

## 97%

of employees with our student loan repayment benefit report<sup>4</sup> being happier at their job

## Our Education Solutions Suite:

### ◆ Student Loan PayDown

Help employees pay back student debt faster and save for the future sooner via contributions to their student loans. Contributions up to \$5,250/year/employee<sup>1</sup> are tax-free for employees and tax deductible for you.

### ◆ College SaveUp

For many Americans, education is one of the most costly yet most valued investments of a lifetime. Amplify employee savings for a loved one's future education via direct contributions to their 529 education savings plans.

### ◆ Student Loan Retirement Match

Make savings more inclusive for all employees by removing student debt as a barrier to retirement savings. With PlanScope360, you can match employees' student loan payments with contributions towards their retirement account.

### ◆ Financial Core

Equip employees to take control of their financial future via complimentary learning modules, interactive tools, and student loan refinancing opportunities<sup>2</sup> with subscription to the above products.

Ready to make an impact for your workforce?

[Get started | info@planscope360.com](mailto:info@planscope360.com)

<sup>1</sup> The Consolidated Appropriations Act, 2021 extends for 5 years COVID-19 relief that allows employer-provided student loan repayment as a tax-free benefit to employees under Section 127 of the Internal Revenue Code.

<sup>2</sup> Student loan refinancing is only available to employees that reside in certain states.

<sup>3</sup> Source: Vestwell Internal Data, 2024

<sup>4</sup> E\*TRADE Financial Corporate Services, Gradifi Solutions Member Satisfaction Survey, 2019

