



GREENPATH'S PARTNER CENTER

GreenPath's Partner Center is the go-to resource for marketing, education, and staff training needs.

Choose between hundreds of ready-to-use templates and education tools spanning a diverse array of topics.

Financial institutions can easily connect those they serve to caring, judgement-free financial counseling and education.

One-stop access to in-depth staff training materials.

"The step-by-step instructions were helpful for a speedy implementation."

J. Mendes, Dane County Credit Union

"It's great for easy, ready to use material for members, our blog, and social."

M. Storck, 121 Federal Credit Union



(248) 994-8705

PartnerDevelopment@greenpath.com

CHECKING ACCOUNT RESPONSIBILITIES

Use Mobile Banking Apps

Financial institutions are common. Mixed a due date, dealt with an overdraft, confused about a rejected transaction.

Mobile banking apps can help you feel confident before a purchase by allowing you to check your available balance.

Know Your Card Types

Credit Cards: "Purchase now, pay later". A credit card allows you to complete a transaction, however, it's borrowed money that you will have to pay back at a later time.

Debit Card: Withdraws money directly from your checking account, no fees or additional interest rates. The money must be available in your account to use this card on a transaction.

ATM Card: Can be used only at ATM machines to withdraw cash, not able to be used for purchases.

Protect Yourself from Overdraft Fees

Setting aside a line from each paycheck to help with future expenses.

Track all expenses and bills that are on autopay so you can always calculate the available balance in your account.

The day you get a bill, it may not debit. Keep your account on the zero day. Account for the processing time for your bill and bill pay. Don't have any unexpected drafts from your account.

Financial counseling is free at GreenPath, a 50-year trusted national nonprofit. Chat with an expert today. **877-337-3399**

GreenPath financial wellness 877-337-3399 | MY.GREENPATH.COM

Navigating Medical Debt

Medical debt can often be overwhelming to navigate, especially when unaware of what options may be available.

Consider these tips for navigating through your medical debt.

Three Steps You Can Take

1 Call your medical provider and ask for financial assistance

- Financial assistance, or charity care, from your provider.
- You may be required to submit an application.
- You may need to supply tax forms/pay stubs.

2 Ask for a lower bill

- You may be able to negotiate a lower bill.
- You can request an itemized bill to review charges.

3 Request a payment plan

- You may be able to arrange a payment plan.
- Review your income, expenses, and other financial information, to ensure the payment plan fits your budget.

i Did you know as of July 2022 any medical bills you pay off after they were sent to collections should be removed from your credit report?

Just make sure you get it paid in full, since outstanding medical debts can remain on your credit report and impact your score.

Conceptos Financieros para

ANOTE SUS METAS A CONTINUACION

Metas que le gustaría alcanzar en los próximos 1-2 años

Metas que le gustaría alcanzar en los próximos 2 a 5 años

Metas que le gustaría alcanzar en más de 5 años

Establecer Metas

Meta	A corto o largo plazo círculo uno	Cantidad Total Necesaria
	Corto/Largo	\$
	Corto/Largo	\$
	Corto/Largo	\$
	Corto/Largo	\$
	Corto/Largo	\$
	Corto/Largo	\$

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Resources to Manage A Financial Transition

Managing a financial transition can have a significant impact on your budget. Finding resources to help navigate through the change and communicating with your creditors may help you reduce stress and feel in control.

Communicating with your creditors is essential to know what options are available and help you prioritize your money and expenses. Your creditors can't offer solutions to help if they don't know what is going on!

Consider how long the transition may last: do you expect it to be short-term (1-6 months) or longer? What income will you have? Do you have any assets you can tap into if needed? What are your priority expenses each month?

As you contact your creditors, document the



Community Resources During a Financial Transition

1. Salvation Army
www.salvationarmyusa.org

2. Community Action Agency
www.communityactionpartnership.org

Veteran Affairs
www.va.gov

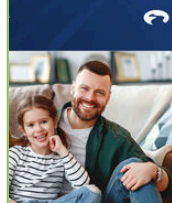
Medical Insurance
www.healthcare.gov

United Way, 211 Referral Hotline
www.211.org

Marketing Resources

GreenPath Partner Center helps partners promote financial wellness to those they serve in a variety of marketing channels.

- Educational articles
- Videos
- Webinars
- Website content
- Email
- Social media



Crezca: Fundamentos G

ueden ser muy útiles para educación financiera.

minar el año con fuerza (o al año que viene) no tiene por qué ser una situación financiera complicada. Invertir en algo que crezca con el tiempo es una de las mejores formas de ahorrar para el futuro.

VECHAR AL MÁXIMO
CERO (10 Minutos)

CÓMO PUEDES...
Dulces



GREENPATH'S PARTNER CENTER

GreenPath's Partner Center offers our partners' **staff resources, tools, and training** to easily educate your team on the benefits of the GreenPath partnership.

BEST IN SHOW

The CU Leadership Convention honored GreenPath's Partner Center with a "**Best in Show Innovation Award**".

"Their training tools, which are well produced and informative, help us train our staff in a thorough yet timely way."

A. Brown, Kennebunk Savings

"It's like having a virtual toolbox available to us at any time."

M. Hein, Marine Credit Union

Schedule A Personalized Tour with GreenPath's Partner Development Team

(248) 994-8705

PartnerDevelopment@greenpath.com

BEST USE OF DIGITAL MARKETING WITH PARTNERS

+48% increase in YTD GreenPath Debt Management Plan partner referrals, which represents the largest annual percentage increase when compared to other Debt Management Plan referral channels.

GreenPath Conversation Starters

Elevate the Customer Experience
Let customers know about GreenPath during routine interactions to elevate with your financial institution.

General Connection
"I'd like to connect you with partner, GreenPath Financial W help you develop an action pl financial goals. This is an opp sure you feel informed and con financial health and prepared stress. Speaking with this t partner is a free and confid benefit - let's get you connected"

New Account Holder
"Now that you're a customer, yo free and confidential financi

HOW TO GUIDE

An effective GreenPath digital marketing program informs and inspires those you serve with in-depth insight about financial wellness.

Sharing GreenPath content

Your Adventure GreenPath SuperU

What's So Super About Being a SuperUser?

GreenPath's SuperUser program provides you confidence to help those you serve their financial health and wellness.



arningLab+ by GreenPath
LINE FINANCIAL EDUCATION

FINANCIAL WELLNESS TESTIMONIAL
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