

# Your path to financial well-being starts right here.

Start taking advantage of your financial benefits today.

Everything you need to manage your financial benefits, navigate debt with ease, and improve your financial wellness is located in one convenient place—your SoFi at Work Dashboard.



Got questions? We've got answers. | Call **833-277-7634** | Monday–Thursday: 5am–7pm PT • Friday–Sunday: 5am–5pm PT

# These six benefits lead the way.



## SoFi Financial Planners

Get complimentary access to credentialed financial planners who can help you navigate student loans, buying a home, retirement, and more.



## Your finances at a glance

Get a 360-degree view of your finances with free credit score monitoring and the convenience of tracking all your financial accounts in one place.



## Student loan refinancing

Enjoy SoFi's competitive fixed rates on student loan refinancing\*, plus SoFi at Work members get exclusive rate discounts.



## 2x SoFi Checking and Savings

Open a checking and savings account, add direct deposit, and you'll gain access to the many benefits of a SoFi Plus membership, including a highly competitive savings APY.



## Financial education

Financial literacy is the cornerstone of financial well-being. SoFi Learn will equip you with a library of educational resources to help you on your way.



## Financial tools and calculators

With the right financial tools, you can easily manage debt, budget for a home, save on loans, and more.



## Four simple steps to sign up.

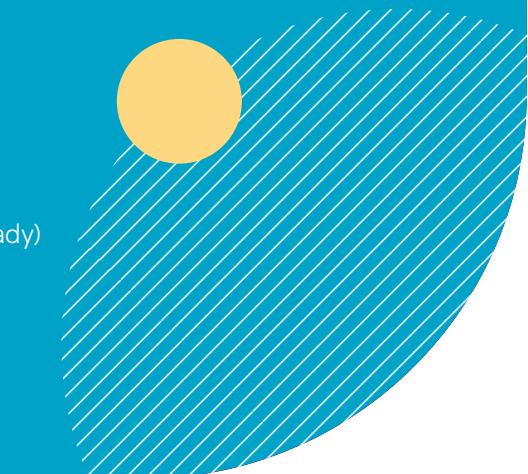
**Step 1: Visit [SoFi.com/Sares-Regis](http://SoFi.com/Sares-Regis)**

**Step 2: Enter your name and company email**

**Step 3: Create a SoFi account** (or sign in if you have one already)

**Step 4: Explore your Dashboard**

[Start now](#)



Products available from SoFi on the Dashboard may vary depending on your employer preferences.

**\*NOTICE:** If you are a federal student loan borrower you should take time now to prepare for your payments to restart, including the opportunity to refinance your student loan debt at a lower APR or to extend your term to achieve a lower monthly payment. Please note that once you refinance federal student loans you will no longer be eligible for current or future flexible payment options available to federal loan borrowers, including but not limited to income-based repayment plans or extended repayment plans.

Financial Tips & Strategies: The tips provided on this website are of a general nature and do not take into account your specific objectives, financial situation, and needs. You should always consider their appropriateness given your own circumstances.

**Notice: SoFi's Refinance Loan is a private student loan. Understand that when you refinance federal loans, you forfeit all flexible federal repayment options that are or may become available to federal student loan borrowers. If you expect to incur financial hardship that would affect your ability to repay, you should consider federal consolidation loan options.**

Terms and conditions apply. SOFI RESERVES THE RIGHT TO MODIFY OR DISCONTINUE PRODUCTS AND BENEFITS PROSPECTIVELY BASED ON MARKET CONDITIONS AND BORROWER ELIGIBILITY. Your existing student loan(s) must total a minimum of \$5,000 to be eligible for refinancing. Additional terms and conditions may apply. To qualify, a borrower must be a U.S. citizen or other eligible status, be residing in the U.S., have graduated with an associate degree or higher from an eligible Title-IV-accredited college or graduate program, and meet SoFi's pre-established underwriting requirements, including verification of sufficient income to support your ability to repay; see [SoFi.com/eligibility](http://sofi.com/eligibility). Lowest rates reserved for the most creditworthy borrowers. You may pay more interest over the life of the loan if you refinance with an extended term. SoFi refinance loans are private student loans and do not have the same repayment options that the federal loan program offers, or may become available, such as Income-Based Repayment or Income-Contingent Repayment or PAYE. Information current as of 9/14/23 and subject to change.

SoFi Checking and Savings is offered through SoFi Bank, N.A. Member FDIC.

SoFi Plus is a premium membership product that gives members access to our best APY, offer discounts, rewards, and more when they set up direct deposit. Benefits are subject to change and may not be available to everyone. To learn more about SoFi Plus and all of the terms and conditions, go to [SoFi.com/SoFi-Plus](http://sofi.com/sofi-plus).

SoFi's Insights tool offers users the ability to connect both SoFi accounts and external accounts using Plaid, Inc's service. When you use the service to connect an account, you authorize SoFi to obtain account information from any external accounts as set forth in SoFi's Terms of Use. SoFi assumes no responsibility for the timeliness, accuracy, deletion, non-delivery or failure to store any user data, loss of user data, communications, or personalization settings. You shall confirm the accuracy of Plaid data through sources independent of SoFi. The credit score provided to you is a VantageScore® based on TransUnion® (the "Processing Agent") data.

Advisory tools and services are offered through SoFi Wealth LLC, an SEC-registered investment adviser. 234 1st Street San Francisco, CA 94105.

SoFi Student Loan Refinance Loans, Personal Loans, Private Student Loans, and Mortgage Loans are originated through SoFi Bank, N.A., NMLS #696891 (Member FDIC), ([www.nmlsconsumeraccess.org](http://www.nmlsconsumeraccess.org)) For additional product-specific legal and licensing information, see [SoFi.com/legal](http://sofi.com/legal). 2750 E. Cottonwood Parkway #300 Cottonwood Heights, UT 84121. ©2023 Social Finance, Inc. All rights reserved. Information as of September 2023 and is subject to change. AW23-1476504-N