

SAVERLIFE ENROLLMENT GUIDE

This step-by-step guide explains how to sign up for SaverLife, a free online savings program. You can sign up in just a few minutes on your laptop, phone, or tablet. It's that easy!



Every month that you save **\$20**, SaverLife will match your savings with **\$10** — up **\$60** to in six months.

You'll get weekly tips from a financial coach and have the opportunity to **win prizes for saving!**

TO SIGN UP, YOU NEED:

- An email address
- A personal bank account in your name
- Your online banking credentials (i.e. username and password)



STEP 1: Go to www.ctalicesaves.org

Complete the short form and click "Submit" to go to SaverLife



STEP 2: Set up your account:

- Fill out your first and last name
- Check the box to agree to our Terms of Service
- Fill out your email address
- Click on "Create Account"
- Choose a password

STEP 3: Answer a few quick questions to apply



- Zip code
- Household size and income

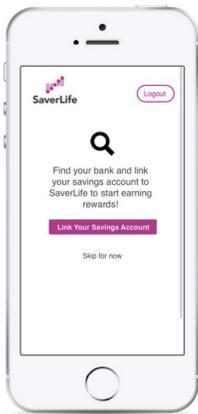


- Select a savings goal
- You can also create your own goal



- Gender
- Marital status
- Education level
- Ethnicity

STEP 4: Connect your bank account



Click
"Find my Bank"



Choose your bank
or credit union



Enter your
online
credentials

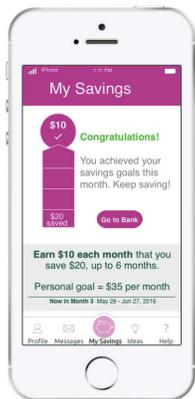


What kind of account should I link?

We highly recommend linking a savings account if possible. However, if you do not have one, feel free to link a checking or PayPal account.

SaverLife uses bank-level security and encryption to protect your financial data. We do not store your credentials and we have read-only access to your account.

STEP 5: Time to start saving!



Log in at saverlife.org to track your progress toward your savings goals and check what rewards you've earned.

We'll also send you reminders to save!

How can I earn rewards for saving?

You'll earn \$10 for each month that you save at least \$20 in your linked account - up to \$60 over six months! You can claim your rewards after six months by completing an exit survey.

How do I make a deposit?

You'll make your monthly deposits at your bank. You can make a deposit online or in-person at a bank branch. Once you've made a deposit, it should appear in SaverLife within 3-6 days.

What happens if I make a withdrawal?

That's okay! We know stuff comes up. Just be sure to put back whatever you took out of your account, plus \$20, by the end of the program month.

SaverLife uses bank-level security and encryption to protect your financial data. We do not store your credentials and we have read-only access to your account.

STEP 6: After six months, claim your rewards

- Log in to your SaverLife account and click "Claim Rewards"
- Enter your bank routing and account number so we can transfer your rewards
- Wait 5-6 business days and your rewards will appear in your account



QUESTIONS?

Feel free to email us at help@saverlife.org with any questions, comments, or concerns. We're here to help!