

Name of Company/Organization/Agency: SmartAsset

Mailing Address: 122 East 42nd Street, Suite 4300

City: New York

State: NY

Zip: 10168

Taxpayer ID Number: 27-4610921

Principal Business: With more than 200 employees across 21 states, SmartAsset is the most widely-viewed source of personal financial information and advice on the web. Our mission is to help people make smart financial decisions and we reach more than 100 million people each month through our interactive calculators, data-driven studies, topical guides and financial product reviews. To help our vast audience with the types of financial decisions that are best informed by professional help, SmartAsset also powers SmartAdvisor - the largest marketplace connecting consumers and financial advisors in America.

Primary Contact Name: Nora Droste

Title: Vice President of Human Resources

Pronoun Preference: She/Her

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Type of Company/Organization/Agency: Small For-Profit Business

Current financial education/financial literacy activities: Financial literacy is a core component of SmartAsset's business. Our award-winning Editorial team publishes a widely-read blog, SmartReads, which provides educational personal finance content. Additionally, our free and interactive tools help consumers make smarter decisions on home buying, refinance, retirement, taxes, and investing, among other topics.

SmartAsset is also passionate about improving financial literacy in our local community and works towards this mission through our SmartStart initiative. SmartStart is an eight-week program that provides practical personal finance tools and advice to NYC high school students. Specifically, we partner with the NYC iSchool, working with the classes of Catherine Turso, who teaches finance and economics to grades 9-12.

SmartStart volunteers represent a wide range of teams and perspectives across the company. They meet weekly with iSchool students to discuss topics ranging from taxes and banking to credit cards and investing. The lessons involve helping students create a personal spending/saving budget, navigate online banking,

understand the importance of credit usage and scores, compare financial aid award letters and prepare for job interviews.

SmartAsset began this partnership in Spring 2019 and has completed four rounds since, two of which have moved to a virtual setting since the onset of COVID-19. Pre-coronavirus, the SmartStart program typically wraps up with a field trip to SmartAsset's NYC headquarters for students to present final projects and hear from company leaders about their career paths and passion for financial education. To date, we have worked with 100+ students and look forward to continuing this partnership.

Interest in becoming a national Jump\$Start Coalition Partner:

**Explain your organization's interest in becoming a national Jump\$Start Coalition Partner, emphasizing your commitment to the financial literacy mission.**

SmartAsset is interested in rapidly expanding its financial literacy reach, influence and impact for all people nationwide. The SmartStart program directly improves financial literacy among students in our local community, however, we want to help students across the country. Becoming a Jump\$Start partner would enable SmartAsset to accomplish this goal.

SmartAsset hopes to further Jump\$Start's mission through providing explanatory content from our website to the Jump\$Start Clearinghouse. By sharing our content, we hope that it can serve as an informative resource for teachers, parents and students alike.

We are also particularly excited about the multiple ways Jump\$Start facilitates the involvement and engagement of partners. Many of SmartAsset's nationally-recognized business partners are a part of Jump\$Start and we look forward to working with them more closely to improve financial literacy in the U.S. We are additionally excited to meet and work with other partners through key Jump\$Start initiatives such as the Annual Awards Dinner, Hill Day and National Educators Conference.

Jump\$Start offers a unique opportunity to partners. By bringing the financial literacy community together to share information and resources, it elevates and bolsters the individual missions of partner organizations. As a rapidly growing company, SmartAsset is increasingly dedicated to the ways we can provide inclusive access for all consumers to the same financial products and resources.

Reference Contact Name :

Catherine Turso

Reference Organization:

NYC iSchool

Email:

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Daytime Phone: 201-893-3303  
Business Affiliation: Financial Literacy Program Partner  
Add 2nd Reference?: No  
Acknowledgement: By submitting this application, I affirm that I am authorized to apply on behalf of my organization and that the information is complete and correct to the best of my ability. I have read the partner eligibility information and if accepted as a national Jump\$tart Partner, will direct my organization to pay the annual dues as invoiced.

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