

A bit about  
**the bloom affiliate program**



[bloom.com](https://bloom.com)  
[affiliates@bloom.com](mailto:affiliates@bloom.com)

What is bloom?



## Smart. Simple. 401k optimization.

Have a 401k, 401a, 403b, 457 or TSP? Link bloom to your account, then put us to work fixing, managing and monitoring your 401k—all the way to retirement.



Watch [this video](#) to hear the bloom story.

<https://bloom.wistia.com/medias/v4j8xh7ptn>

## Bloom Affiliate Program

# Let's get affiliated.

Interested in working with bloom on an affiliate basis?  
Join the Impact platform. There are 2 ways to get paid—analysis or client. This video shows the bloom sign up flow.

<https://bloom.wistia.com/medias/o4ftmxnh12>

The free analysis (lead actions fires at 1:13 and the customer acquisition (client) pixel fires at 1:18.



### **Paid on analysis.**

**Current term set at \$15/analysis.**

Pixel fires when someone receives their truly FREE analysis of their company-sponsored account. No credit card needed!



### **Paid on client.**

**Current term set at \$50/client.**

About 40% of those who analyze, convert to paying client.  
This payment model requires a background check and additional compliance.

[Click Here to Join Impact](http://app.impact.com/campaign-mediapartner-signup/Bloom-CPL.brand?type=dm)

<http://app.impact.com/campaign-mediapartner-signup/Bloom-CPL.brand?type=dm>

This is how bloom works.

## Joining bloom's affiliate program is easy as...

1

### Sign up in Impact.

If you're interested in the analysis (lead term, apply for the bloom program in Impact. If you would like to be put on a solicitor (client) term contact [affiliates@bloom.com](mailto:affiliates@bloom.com) and we will start your background check.

2

### Share bloom.

Pull existing links, banners and content from Impact and get promoting right away! Or, create new content (review, blog, newsletter, etc.) but bloom will need to run it by our compliance team before it's posted!

3

### Get paid.

Actions are paid 20 days after the end of the month they locked.

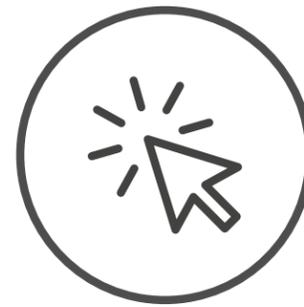
# Need content?

Here's what's working for our partners.



## Reviews

Show users the inner workings of bloom. Explain how easy it is to get the free analysis, and the benefits you receive by becoming a member. (Remember, no testimonials! But factual product reviews are great.)



## Content + Push

Writing an article is great for context, but reminding readers through newsletters and social mentions helps put bloom top of mind.



## Assets For Your Use

Videos, Banners and Text Links - Can be found in the content section on Impact

Quiz - <https://www.bloom.com/q/bloom-is-right-for-you/>

Advisor Interview -

Contact [affiliates@bloom.com](mailto:affiliates@bloom.com) to set up a time to interview a founder or advisor.

# Why people love bloom...

As always, our retirement account analysis is FREE. (Yes, really.) But if you choose to become a paying member of bloom, here are a few benefits.



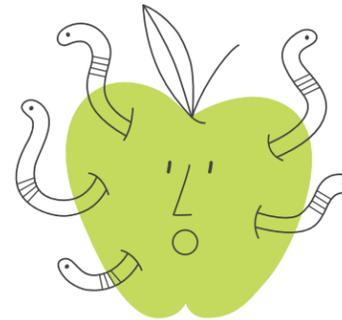
## Personalized portfolio.

We do the work for you – picking the stock/bond mix to help meet your retirement goals.



## Chat with advisors.

Gain unlimited online access to real, human advisors for all your finance questions. For the fraction of the price of a traditional advisor.



## Squash investment fees.

We find and minimize pesky investment fees that could put a dent in your retirement savings.



## Low flat fee.

Unlike Wall Street, we don't make money off the funds we recommend or concoct some confusing system to understand how much you owe us.



## Weather the market.

Put an expert in the driver's seat. We're here to help guide you (and your 401k or IRA) through it.



## Safe and secure.

We take security seriously at bloom and we have extra measures in place to make sure your information is kept safe.

## Bloom FAQ

# You ask. We answer.

### Is the check-up truly free?

Yes. Our experts are able to give you a real, unbiased analysis of your existing employee-sponsored retirement account. No strings attached. Should you choose to have bloom make the recommended changes for you—and manage and monitor your account as you near retirement—we'll do it for a low flat fee.

### What types of accounts can you manage?

Bloom can analyze and manage almost any employer-sponsored retirement account including 401k, 403b, 401a, 457 or TSP. We also manage IRAs at Fidelity, Charles Schwab and Vanguard.

### What do paying members get?

While our analysis is always free, a low annual fee lets bloom make trades on your behalf. Our experts will monitor and manage your account as funds and circumstances change while you near retirement. On top of a worry-free retirement, paid members have access to our financial advisors for any questions beyond 401ks. Student loan debt? Buying a house? We can help you make better financial decisions.

### How does bloom make money?

We are a subscription-based service. We do not make any money off the funds in your account. We are not associated with any financial institution. That way, we can give truly unbiased help with your investments.

## Bloom Compliance

# General compliance requirements.

Because bloom is a Registered Investment Adviser, there are a few things you should be aware of.

In order to work with us,  
you must agree to...

Full explanation of requirements [here](#). Failure to follow these terms could result in payment reversal.

1. **Have a written agreement** between bloom and the affiliate partner. (In Impact.)
2. **Clearly post that the content on the site is sponsored.**
3. **Confirm the content complies** with the regulatory advertisement requirements:
  - No testimonials.**
  - No specific examples of how bloom has saved someone money.**
  - Source all graphics correctly.**
  - Don't mislead anyone.**
  - Don't guarantee success. Leave room for uncertainty.**
  - Our analysis is free. Bloom is not.**
  - No federal or state endorsements.**
  - Cite 3rd party rankings appropriately.**
4. **Use affiliate tracking links in Impact to ensure you're sending prospects to the correct landing page.**  
If you're being paid on a client/final payment action, please work with bloom to ensure you're using the correct landing page.
5. **Let us know it posted and send us a copy!**

# Dos and don'ts when talking about bloom

## Do

---

### **Explain the offerings.**

Say... Bloom is a new, simple way to manage your 401k.

### **Explain the price.**

Say... Bloom's analysis is totally FREE. They charge a flat annual fee for their managed service. See current pricing at [www.bloom.com/pricing/](http://www.bloom.com/pricing/)

### **Explain the benefits.**

Say... Bloom could help lower your expense ratio.

## Don't

---

### **Don't give personal opinions.**

Don't say... Bloom is awesome, you should use it because I do.

### **Bloom is not free, the analysis is.**

Don't say... Bloom is free.

### **Don't guarantee anything.**

Don't say... Bloom will save you a bunch of money.

# Get in touch!



**Bloom**

[affiliates@bloom.com](mailto:affiliates@bloom.com)