

Finleap – Financial Wellbeing Platform

About Finleap

Finleap is a comprehensive digital financial wellbeing platform designed to help employees improve their financial knowledge, make informed financial decisions and achieve long-term financial wellness.

The platform combines personalised financial journeys, financial planning tools, calculators, expert counselling, learning resources, webinars and practical financial guidance — all accessible through a single platform.

Finleap acts as a trusted financial companion by encouraging positive financial behaviour through practical financial tools, structured learning journeys and actionable financial education.

Platform Access

Employees can securely access the platform through Single Sign-On (SSO) using their official organisation credentials.

Finleap Platform Link:

<https://finleap.finsafe.in/adobe>

Upon first login, users are required to:

- Complete basic profile details
- Undertake the mandatory Financial Health Assessment (FHA)

Financial Health Assessment (FHA)

The Financial Health Assessment evaluates an individual's financial well-being across important financial areas, based on the Financial Health Score, users receive personalised recommendations and financial journeys tailored to their needs.

Financial Journeys

Finleap offers structured financial journeys designed to encourage financial learning and action-oriented behaviour.

The available journeys include Money Basics, Debt Planning, Risk Protection, Goal Planning, Wealth Growth, etc.

Each journey contains: Bite-sized educational videos, Practical financial tasks, Timely nudges and reminders.

These journeys help employees progressively improve their financial well-being through practical implementation.

Live Chat Support- Every Thursday(4PM-5PM)

Finleap also offers a Live Chat session every Thursday, where employees can interact directly with financial experts and get guidance on personal finance-related topics.

The live chat is conducted by experts and is designed to provide: General financial guidance, Clarifications on financial concepts, Support on platform-related financial resources and Interactive learning opportunities.

Employees can participate in these sessions through the platform and benefit from expert-led discussions in a collaborative environment.

Financial Planning Tool

Finleap provides advanced financial planning tools to help employees better manage and organise their finances.

Quick Planner

- Takes approximately 10 minutes to complete
- Requires consolidated inputs on: Income, Assets, Liabilities and Expenses
- Generates a high-level financial plan

Comprehensive Planner

- Detailed financial planning experience
- Covers: Income, Expenses, Investments, Insurance, Assets and liabilities, Financial goals.

- Supports NSDL CAS upload for investment analysis
- Enables long-term goal tracking

Additional consent is required before using the financial planning tool, as the information is securely stored for future access and progress tracking. No sensitive information, such as PAN details, is stored.

Financial Calculators

The platform provides access to multiple financial calculators, including Expense Calculator, Old vs New Tax Regime Calculator, Loan Calculators, Retirement Planning Calculator, Goal Planning Calculator, NPS Calculator, Financial Freedom Calculator, Advanced Mutual Fund Calculators, etc.

The calculator outputs are indicative and intended for educational and planning purposes only.

Learning Resources has recorded webinars, blogs, podcasts, e-learning courses and short videos

Topics covered include Investments, Taxation, Insurance, Loans, Mutual Funds, Retirement Planning, Banking, Digital Fraud Awareness, etc.

E-Learning Courses

The platform offers structured learning programs, including:

- FinStart – Beginner Level
- FinShield – Intermediate Level
- Mutual Fund Course
- FinSmart – Advanced Level

Employees can enroll in these courses free of cost and complete assessments as part of the learning process.

Webinars

Pre-recorded webinars are available on: Taxation, ITR Filing, Insurance, Loans, Financial Planning, etc.

Recordings of future organisation-specific webinars will also be hosted on the platform.

Ask Me Anything (AMA)

The AMA feature enables employees to ask personal finance-related questions directly on the platform.

Responses are carefully curated by the Finsafe expert team and additional queries are reviewed to ensure users receive relevant and reliable financial information.

1:1 Expert Counselling Services

Finleap provides access to one-on-one counselling sessions conducted by experienced financial and domain experts at discounted prices exclusively for employees.

The counselling services available include Financial Counselling, Investment Portfolio Review, Stock Portfolio Review, Tax Counselling, Insurance Counselling, Debt Counselling, Loan Against Securities, Debt Consolidation, Debt Resolution, Legal Counselling and Credit Card Optimisation.

These sessions are conducted by qualified professionals, including Chartered Financial Planners, Registered Investment Advisors, Chartered Accountants, Insurance Experts, Debt Counsellors and Legal Professionals.

Employees can schedule counselling sessions directly through the platform.

Additional Resources

Other resources available on the platform include Financial Assets Repository, Product Allocator Tool, Money Foundation Toolkit, Mutual Fund Scheme Information and Employee Financial Handbooks.

Data Privacy & Security

Finsafe stores only essential user information required for platform functionality.

- Calculator data is not stored
- No sensitive personal identification information, such as PAN details, is collected
- Financial planning data is securely stored only after explicit user consent

Help & Support

Employees can raise queries related to: Technical support, financial queries and Platform assistance.

Support requests can be submitted through the Help section available on the platform. Queries are generally resolved within 24–48 hours.