

All-in-one financial coaching and personal finance tools

As a Workmate, you have access to a free sponsored membership to Northstar, a holistic financial planning platform.

Work with a dedicated Northstar Financial Advisor on your financial & life goals. We take a life stage approach to personal finances. You tell us your goals, and we'll map out a custom optimal plan to get you there.

In addition to helping with budgeting, saving, debt management, investing, and insurance, Northstar knows the full compensation/benefits package you have access to through Workday. We'll recommend how to best utilize pre-tax benefits, post-tax salary, equity, and perks to achieve your goals.

We're here to help with all your personal finance questions!



Chat 1:1 with your advisor

Guidance and counseling from your own Northstar Financial Advisor. Via chat, call available.



Budgeting & Decision Tools

We build a budget for you (spending, bills, goals). Tools for managing debt, investments, savings, insurance.



Custom Financial Plan

Actionable, step by step guidance, balancing multiple competing needs and goals. No complicated lingo.



Benefits & Equity Advice

We recommend specific benefits for each employee's financial situation, and how they help achieve your goals.



Supporting All Life Stages

Examples: New to career w/ loans, debt management, starting a family, retirement, and more.

Example questions and ways we help

windfalls and equity advice

building emergency savings

paying off debt

buying a home & refinancing

retirement decisions

budgeting & cash flow

having a baby

insurance decisions