

April 2016

Why Financial Education Should Be Part of Your Strategic Plan

In 2006, **35%** of respondents to an Allianz poll said they would like to **know more** about financial planning and investments

In 2013, that
number nearly
doubled to

65%

Two out of three
people have an unmet
Financial Education need

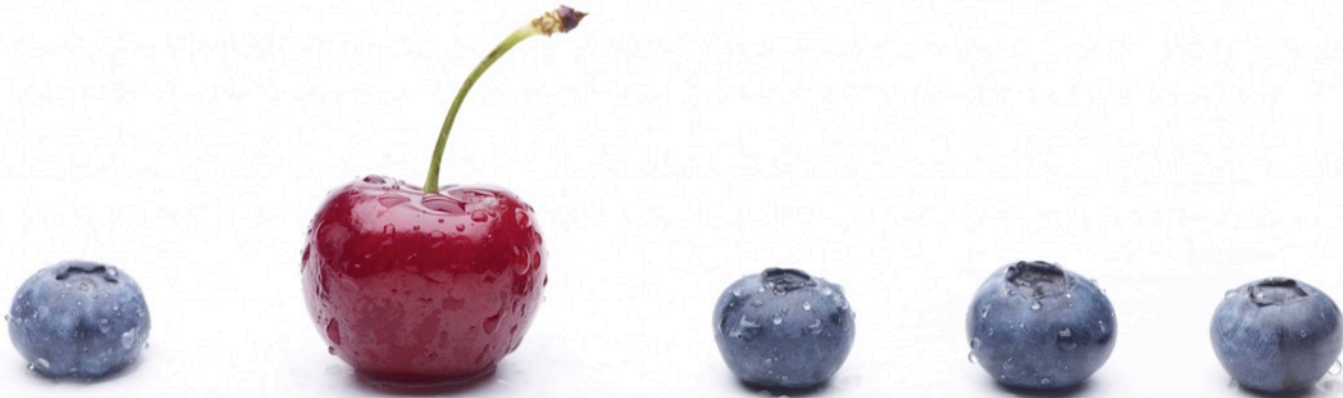



68% felt that financial planning materials were dull and boring.

source: Allianz Women, Power, and Money Study



As marketing channels expand, it becomes more difficult to **stand out**



A close-up photograph of a black speaker. The speaker has a circular driver in the center, which is slightly recessed. The background is blurred, showing some wooden surfaces. A semi-transparent dark grey rectangle is overlaid on the right side of the image, containing white text.

But simply
being “active”
on social just
creates
noise...

...and
technology
changes
everything.



True or False:
An informed consumer is
your best customer

True.

An informed consumer *is*
your best customer ... and
we have data to support it.

Customers are **29 times**
more likely to buy through an
online educational experience
than media advertising.

Customers that purchase due to online educational experiences are **93% more** likely to tell their friends about their experience.

Education = Trust

Trust = Loyalty

Education = Loyalty

HOW TO BUILD TRUST & LOYALTY USING DIGITAL EDUCATION

Make it short. Period.

Make it just-in-time.

Make it mobile.

Make it unbiased
and relate-able.

FAST COMPANY

FAST FEED

SORRY BANKS, MILLENNIALS HATE YOU

A THREE-YEAR STUDY FINDS THAT MILLENNIALS ARE LOOKING FOR WAYS TO LIVE A BANK-FREE EXISTENCE IN THE FUTURE.

Not true. They only hate
the “old you.”

 EverFi **@Work** FINANCIAL EDUCATION
WORKING FOR YOU

A modern and flexible
Financial Wellness course
targeted toward **busy adults**

EVERFI@WORK

Adult Financial Education



Learning Topics (as of April 2016)

- Auto Loans
- Credit Scores & Reports
- Emergency Savings
- Estate Planning
- Financing Higher Education
- Identity Protection
- Insurance & Taxes
- Introduction to Stock Options
- Mobile Payments
- Mortgages
- Overdraft
- Payday Loans
- Payment Types & Credit Cards
- Prepaid Cards
- Retirement Planning
- Savings & Investments
- 529 Savings Plans
- Social Security



Interactivity
increases
learning
and
retention





Mid-course
Knowledge
Checks and
polls measure
and apply
learning

Y también, se habla español



Key Takeaways

Financial Education...

- Builds trust & loyalty
- Can differentiate your brand
- Delivers on an unmet consumer need
- Needs to be short and targeted
- Is needed to stay relevant

Thank you