

MONEY MOVES: A WELLS FARGO FINANCIAL LITERACY CAMPAIGN



STRATEGIC CAMPAIGN PROPOSAL BY AUDREY LUCAS

CAMPAIGN OUTLINE

THE
PROBLEM



THE
OPPORTUNITY



CAMPAIGN
OVERVIEW



TARGET
AUDIENCE



STRATEGIC
PILLARS



EXECUTION
PLAN



MONEY MOVES
IN ACTION —
PART 1



MONEY MOVES
IN ACTION —
PART 2



IMPACT AND
OUTCOMES



WHY IT MATTERS

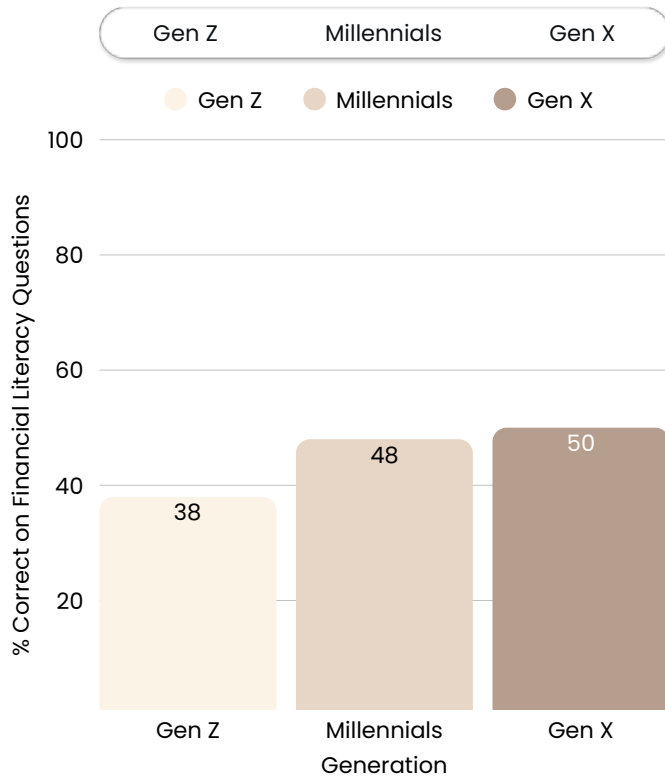
THE FINANCIAL LITERACY GAP: WHY GEN Z IS STRUGGLING

Gen Z is entering adulthood with the lowest financial literacy, facing challenges like student debt, rising costs, and digital scams. While they seek advice from FinTok and social media, a lack of trusted guidance contributes to low financial confidence. This gap highlights an opportunity for Wells Fargo to be a credible, empowering resource in financial education.

The gap between access to financial content and *true* financial preparedness presents a critical opportunity for **Wells Fargo to step in as a credible, empowering resource.**

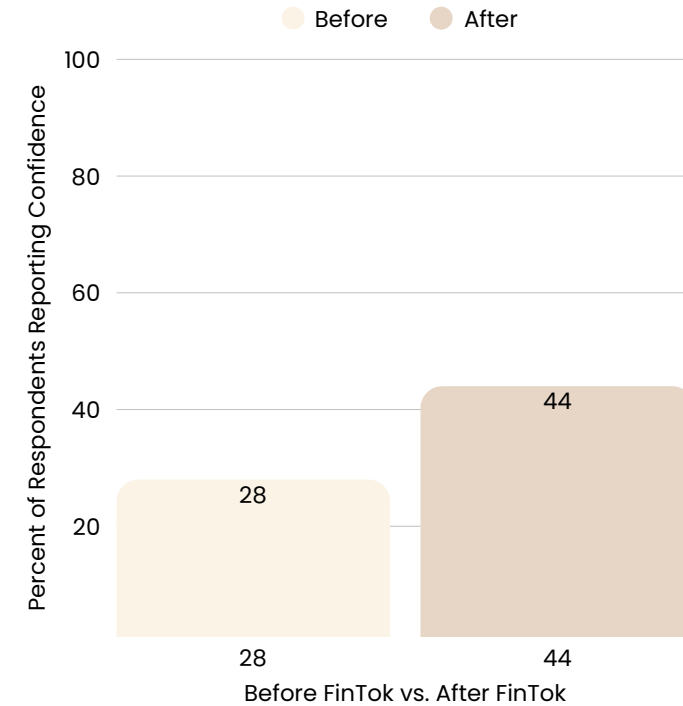


Average Financial Literacy by Generation



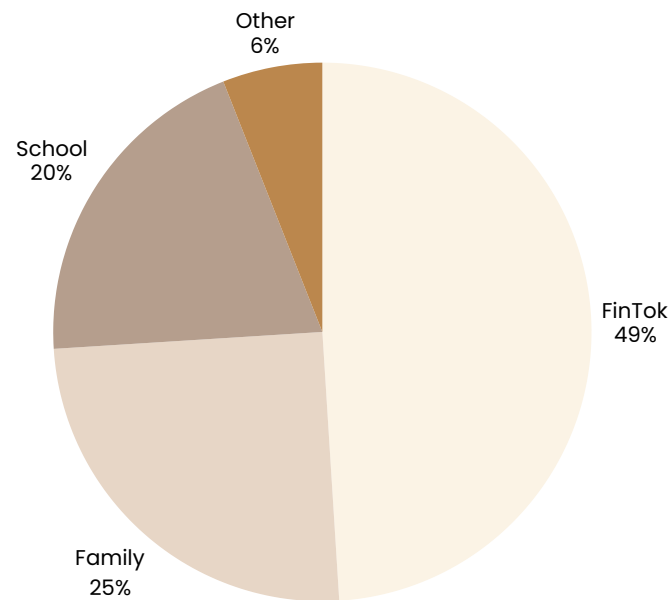
TIAA Institute-GFLEC Personal Finance Index (P-Fin Index), 2023

Confidence After Consuming FinTok Content



New York Post, 2022

Where Gen Z Gets Financial Advice



Morning Consult, 2023

“MONEY MOVES”: A STRATEGIC, COMMUNITY-CENTERED CAMPAIGN

Objective:

- “Money Moves” is a peer-led financial literacy campaign focused on Gen Z, designed to bring in-person education into local libraries and community hubs
- It delivers interactive events and real-world tools for budgeting, saving, credit-building, and financial goal setting
- Wells Fargo interns or associates host live sessions, making learning engaging and relatable
- This complements Wells Fargo’s existing digital programs by bridging the gap between online content and real-life action

Workshops will be hosted in partnership with public libraries, using existing community spaces for cost-effective, high-impact outreach.



“MONEY MOVES” BUILDS ON WELLS FARGO’S HANDS ON BANKING PROGRAM

	Hands on Banking	Money Moves
Format	Online financial literacy modules	In-person library events with interactive learning
Approach	Self-paced, structured, e-learning	Relatable, discussion-based sessions led by peers and young professionals
Target Audience	K–12 students, adults, general public	Gen Z, college students, and early-career young adults
Facilitators	Teachers or independent learners	Wells Fargo interns and associates (professional + peer credibility)
Community Engagement	Scalable but distant	High-touch, local presence in libraries and community centers
Brand Differentiation	Traditional, education-focused	Dynamic, modern, and brand-forward with real-world examples

MONEY MOVES IN ACTION: FREE FINANCIAL LITERACY EVENTS

The Money Moves campaign brings Wells Fargo associates and interns into public libraries to host free, Gen Z-focused financial literacy sessions.

These events build trust, empower local communities, and fill key knowledge gaps using real-life examples and interactive learning.



Budget Like a Boss

Learn to build a budget, track expenses, and set up savings goals using easy, real-world tools.



First Apartment 101 Understand rent, utilities, credit checks, and budgeting for your first lease.



Don't Get Scammed

Spot phishing, fake job scams, and digital fraud tactics targeting young people.



Credit Confidence

Demystify credit scores, building credit, and safe borrowing habits.

Budget Like a Boss

A Financial Literacy Workshop for
Students & Young Adults

Presented by **WELLS
FARGO**

In Partnership with

CHARLOTTE MECKLENBURG
LIBRARY

🌟 Calling all Future
Financial Wizards! 🌟

Wells Fargo & Charlotte Mecklenburg
Library Presents:

"Budget like a Boss" event, part of our Money
Moves series 📚💰

Budgeting tips + tricks + strategies to take
control of your finances



Achieve your financial dreams!



Details in the caption below 📖



🌟 Budget Like a Boss is here!
Join Wells Fargo & Charlotte Mecklenburg
Library for a free financial literacy workshop
made for Gen Z.

📍 Learn to build a budget, manage spending,
and use Wells Fargo tools like Budget Watch.
👉 No experience needed — bring your phone
and leave with real money skills.

📅 October 8th 6:00pm | 📍 Charlotte
Mecklenburg Library
🔗 Register now via link in bio!



**WELLS
FARGO**

FROM CHARLOTTE TO CAMPUSES AND BEYOND

Phase 1 – Pilot Launch (Fall 2025)

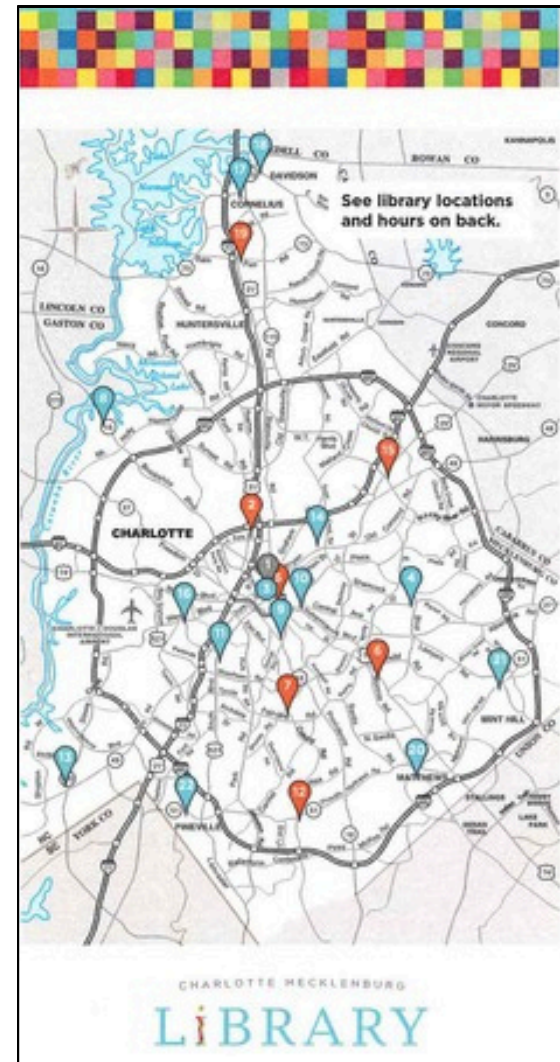
Charlotte, NC

- Host free workshops at Charlotte Mecklenburg Library branches
- Distribute QR code resource kits to parents and educators
- Promote with social content (Reels, Stories, carousel posts)
- Track attendance, QR scans, and feedback to measure impact

*Includes over 20 library locations across Charlotte
— bringing accessibility to neighborhoods citywide*

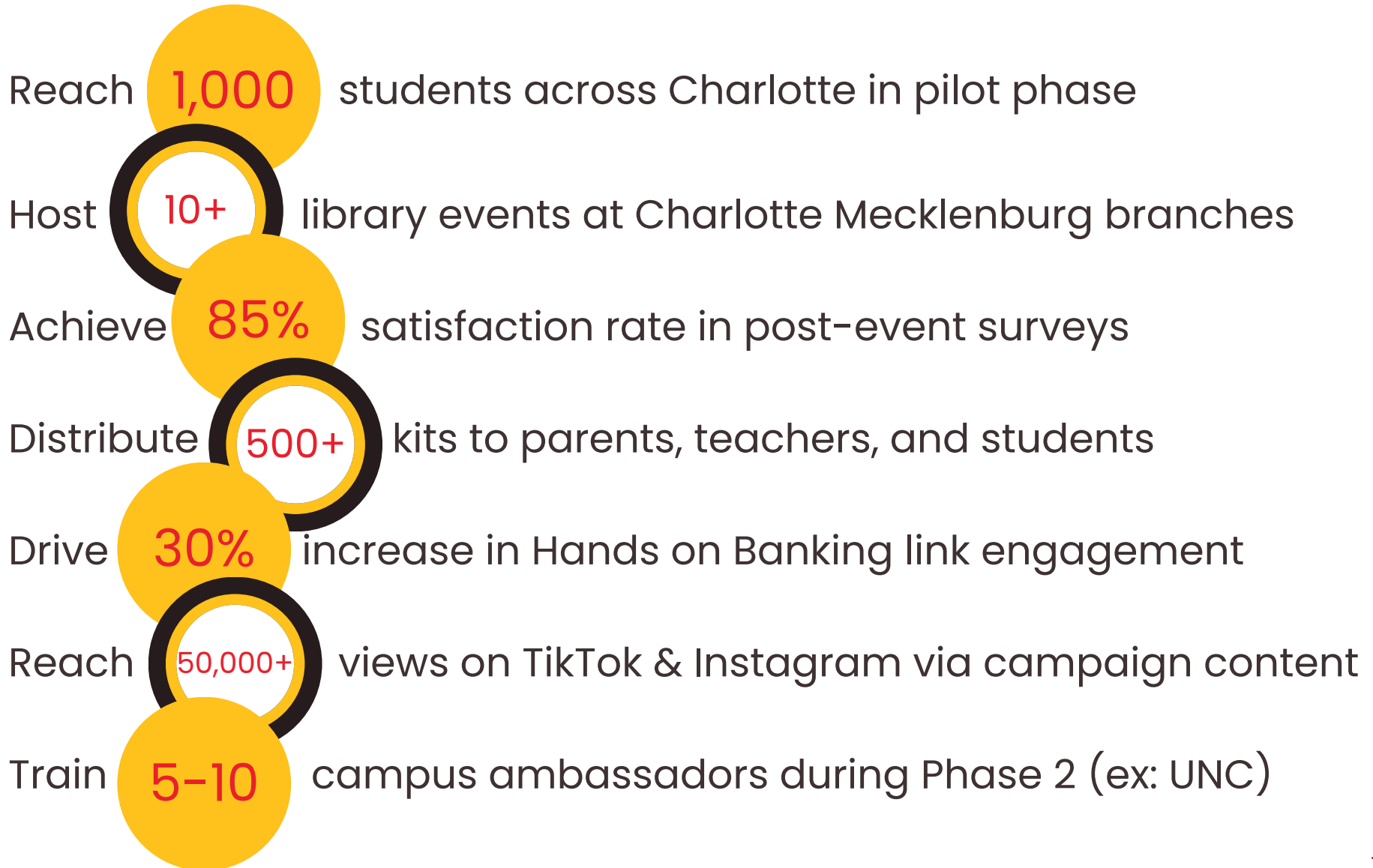
Regional Expansion (Spring–Summer 2026)

- Broaden campaign reach across NC and key Wells Fargo markets.
- Extend workshops to additional NC cities (e.g., Raleigh, Durham, Greensboro)
- Launch the first Campus Ambassador Program at UNC Chapel Hill (your anchor school)
- Ambassadors promote “Money Moves” on campus via pop-ups, peer-led sessions, and content creation
- New KPIs tracked: social media engagement, educator adoption, repeat event signups



IMPACT WE CAN MEASURE

Anticipated Outcomes



INVESTING IN CONFIDENCE, COMMUNITY, AND CHANGE

Wells Fargo has a unique opportunity to lead both in finance and in building trust with future generations.

Through Money Moves, the brand becomes a visible, credible resource in young people's lives. Where they learn, grow, and make their first financial decisions.

This campaign is designed to:

- Advance public affairs and CSR goals through measurable community impact
- Deepen brand equity and relevance with Gen Z
- Strengthen long-term customer loyalty by showing up where it matters most

Wells Fargo will be the brand that makes it happen. Morning, noon, and night.

