



LEVERAGING FINANCIAL EDUCATION:
DIFFERENTIATE & ELEVATE WELL-BEING

JUNE 3, 2025

W E L C O M E

YOUR HOSTS



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W E L C O M E

TODAY'S AGENDA

❖ The Financial Stress of Younger Consumers

- The rise of Finfluencers and what they're getting right—and wrong

❖ Why Credit Unions Are Uniquely Positioned

- Leveraging 100+ years of trust and reclaiming the financial education space

❖ HerMoney Digital Content & How It Helps CU Marketers Work Smarter

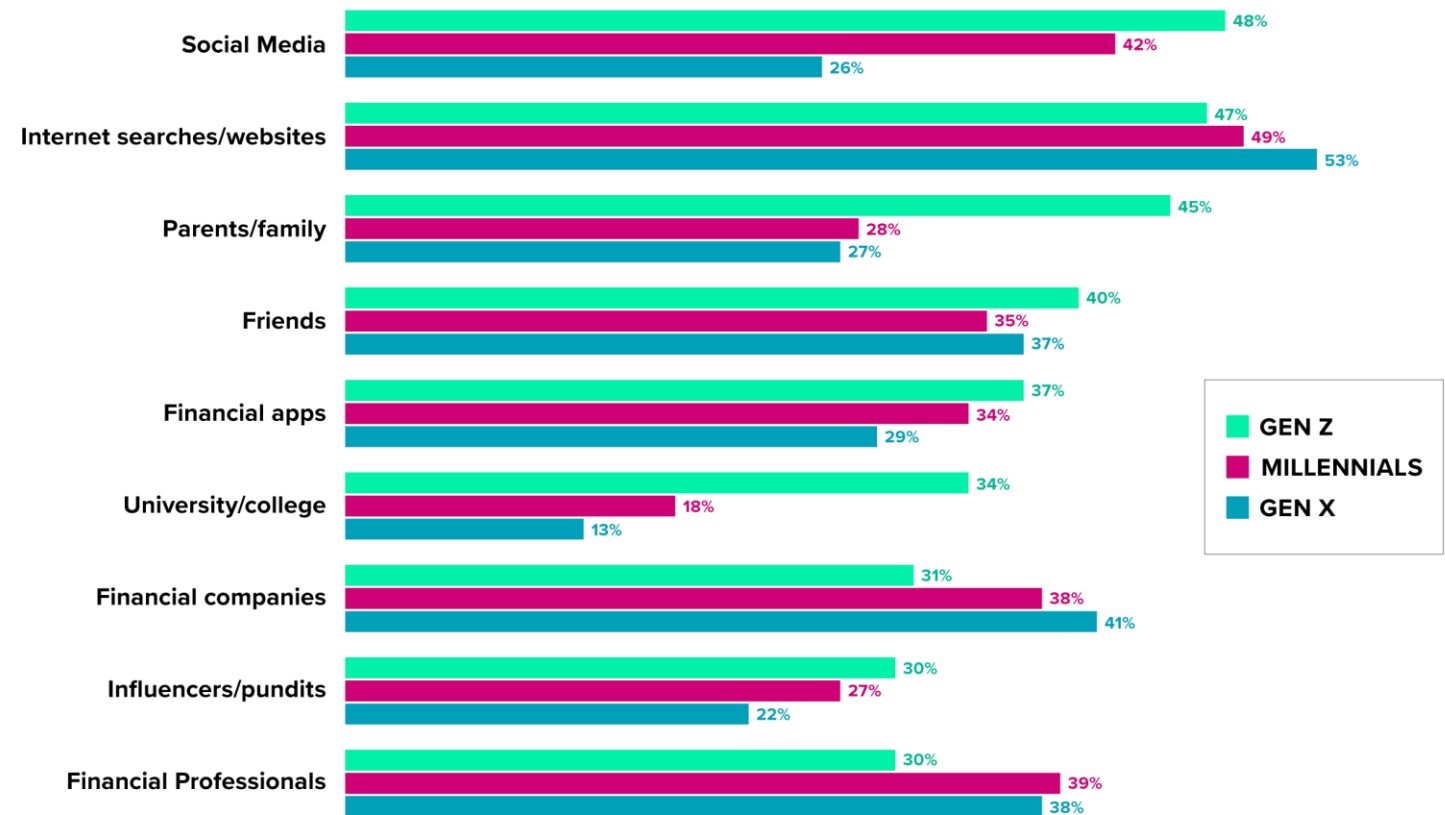
- CU Marketing Support and Social Media Video Playbook preview

❖ Q&A and Next Steps

FINANCIAL STRESSORS, FINFLUENCERS & MORE

- Today's top financial stressors, especially those faced by younger generations
- The “Finfluencer” Movement — What’s good and what’s bad about it
- Financial content that engages audiences today

TOP SOURCES OF INFO BY GENERATION



Sources: <https://www.finrafoundation.org/sites/finrafoundation/files/Gen-Z-and-Investing.pdf>; <https://www.forbes.com/advisor/investing/financial-advisor/adults-financial-advice-social-media/>

FINANCIAL STRESSORS, FINFLUENCERS & MORE

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| Types of Financial Advice Young Adults Receive on Social Media | |
|---|-----|
| Investing in stocks and bonds | 57% |
| Personal budgeting | 51% |
| Passive income | 49% |
| Reducing debt | 40% |
| Building or improving credit | 37% |
| Retirement savings | 35% |
| Investing in cryptocurrency | 33% |
| Investing in real estate | 22% |
| Salary negotiation | 21% |
| Home buying | 20% |
| Investing in other assets | 17% |
| Get rich quick plans | 11% |
| Borrowing money | 7% |

Sources: <https://www.finrafoundation.org/sites/finrafoundation/files/Gen-Z-and-Investing.pdf>; <https://www.forbes.com/advisor/investing/financial-advisor/adults-financial-advice-social-media/>

FINANCIAL EDUCATION & DIFFERENTIATION

- Why it's smart to differentiate on 100+ years of trust and community impact
- Credit unions' opportunity to reclaim the financial education space
- What it means for credit unions to put member well-being at the center



87%

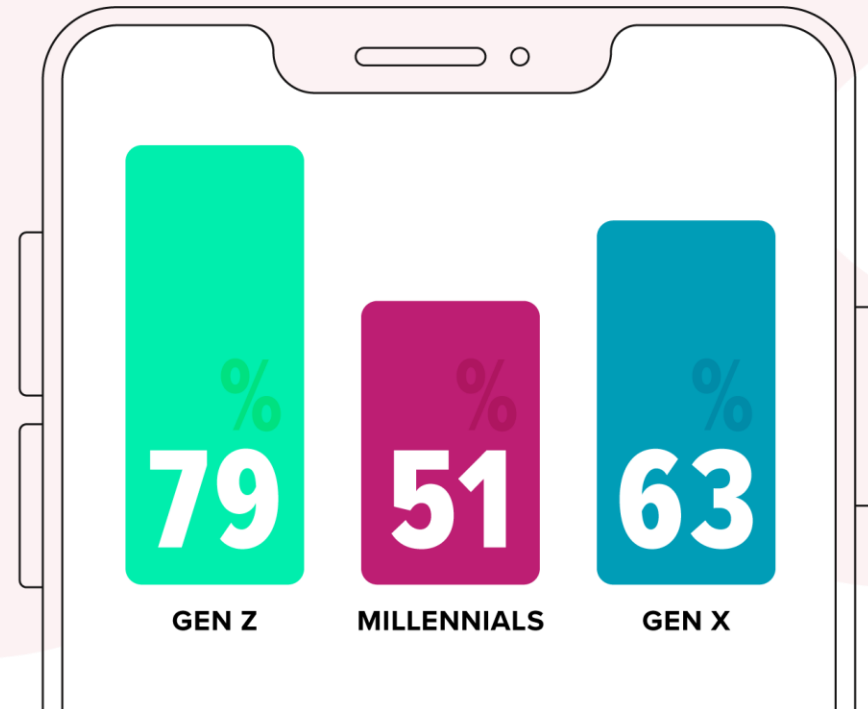
The rate at which Instagram posts about community engagement and employees currently outperform others, showcasing the power of human-centered content.

Source: Jacqueline Zote, "Instagram Statistics You Need to Know for 2024," Sprout Social, February 22, 2024, <https://sproutsocial.com/insights/instagram-stats/>.

HERMONEY PROGRAM & CONTENT SUPPORT

- Top challenge in today's 'feed the beast' social media environment
- Priority focus on marketing's time: storytelling, authentic voice, engagement
- Using HerMoney downloads to supplement and diversify educational resources

ACTIVELY SEEK OUT
FINANCIAL EDUCATION CONTENT
ON SOCIAL PLATFORMS



Source: PYMNTS, "79% of Millennials and Gen Z Turn to Social Media for Financial Advice," PYMNTS, October 14, 2024, <https://www.pymnts.com/consumer-finance/2024/79percent-of-millennials-and-gen-z-turn-to-social-media-for-financial-advice/>.

A BENEFIT TO HELP YOU SCALE

We have a shared mission to strengthen the financial well-being of as many people as possible, which requires meeting people where they are. High-quality social media and educational content is now table stakes for driving member engagement.

Our goal is to make your team's life easier by providing ready-to-publish financial wellness content on a monthly basis.



FILENE x HERMONEY

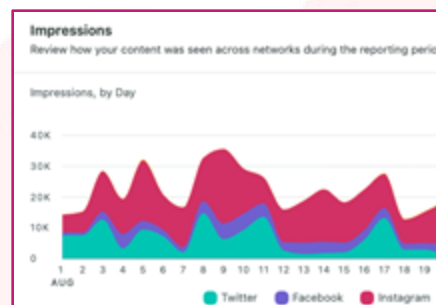
GO-TO-MARKET SOCIAL MEDIA CONTENT

EVERY MONTH YOUR TEAM WILL HAVE ACCESS TO:

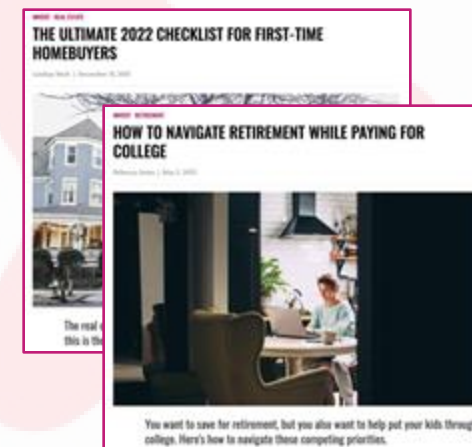
44 SOCIAL MEDIA POSTS
READY FOR YOUR LOGO



BEST PRACTICES
BY PLATFORM



4 WHITE-LABELED
ARTICLES FOR YOUR SITE



EDITORIAL CALENDAR

A FULL YEAR OF CONTENT IS MAPPED OUT TO HELP YOU PLAN YOUR CAMPAIGNS:



Most popular topics of past 12 months:

1. Family & Kids:

- Money Lessons For The Whole Family
- 5 Ways To Raise Financially Savvy Kids

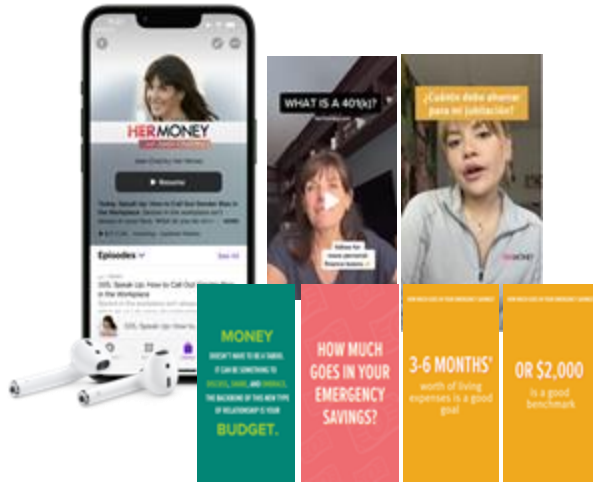
2. Loans, Smart Spending:

- Your First Car Loan
- What Does It Mean To Spend Smarter?

3. Protecting Your Future:

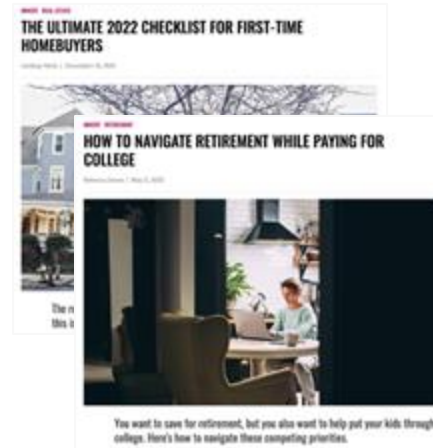
- How Emergency Funds Actually Work
- Life Insurance and Understanding What You Need

CREATING COMMUNITIES THAT CONVERT



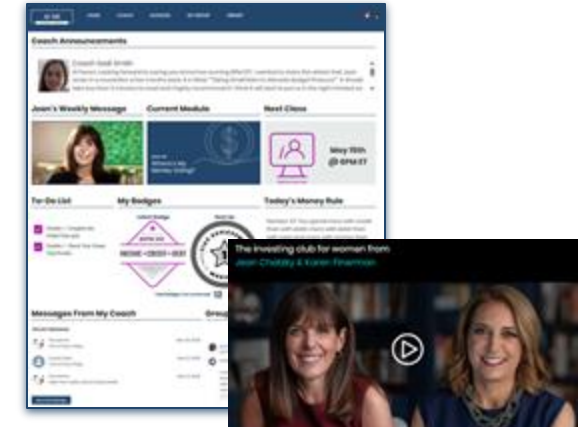
START A DIALOGUE

- Meet people where they are (like on social) and create hooks
- Leverage other awareness channels, like podcasts
- A judgement- and jargon-free content strategy



DELIVER EDUCATION

- Know that people come to personal finance with questions and problems
- Curate content around key life events (having a baby, buying a home, etc.)
- Couple content with actionable advice that builds momentum
- Build on multi-channel approach, and target via newsletters

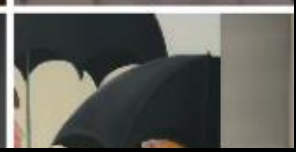
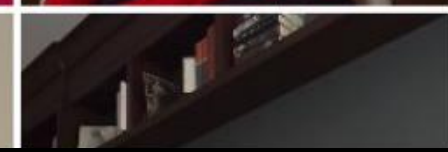
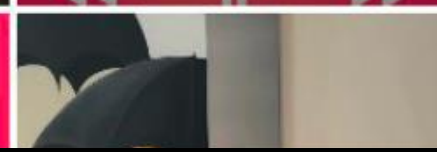


CREATE CHANGE


- Turn information into action with accountability partners (like coaches)
- Create community for connection and support via groups and clubs
- Personalize with 1:1 sessions
- Encourages employee adoption and advocacy via training

SOCIAL MEDIA VIDEO PLAYBOOK

HERMONEY
2025



GETTING STARTED – FILENE.ORG/HERMONEY

 **FILENE MEMBERS:** Email engage@filene.org to find out if you already have access to this Leader level member benefit!

DOWNLOAD

New content available for download by the 20th every month!

CUSTOMIZE

Your team can customize graphics and text with logos, links, and calls-to-action

PUBLISH + TRACK

You'll have access to articles, videos, posts and images plus the playbook. Watch what performs best and provide us feedback to create more of it!

MEET + OPTIMIZE

Attend the quarterly cohort calls with other marketing professionals to learn and network. **Next call is June 18!**

Q&A + NEXT STEPS



GO-TO-MARKET READY
SOCIAL MEDIA CONTENT
TO DEEPEN MEMBER
ENGAGEMENT



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Scan the QR code or visit **FILENE.ORG/HERMONEY** to learn more.