

FinFit by Wells Fargo



YOUR PERSONALIZED FINANCIAL FITNESS COACH

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Felipe's Lifestyle



- Felipe tracks...
 - His steps with his Fitbit
 - His miles with MyFitnessPal
 - His fitness journey
- But he struggles managing....
 - His spending
 - His financial goals

Data informs Felipe's physical health...

Why does his financial health have to be any different?
Wells Fargo has his data, why don't they help him leverage it?

What is FinFit?



- FinFit is a personalized financial coach that helps Felipe...
 - Set short-term budgets
 - ✦ Focused on spending
 - Achieve long-term goals
 - ✦ Focused on saving/investing
 - Better understand his financial habits and behaviors
- FinFit is an integrated service provided by Wells Fargo that helps Felipe by educating him financially through personalized tips and celebrating his achievements through community support.

Key Features



- **Education**
 - Drills, quizzes and tips
 - Understand Felipe's base knowledge, show him where to improve
- **Personalization**
 - Personalized dashboards and tips based on spending data
 - Target Felipe's individual budgets and goals
 - Wells Fargo provides Felipe with a financial trainer
 - ✦ Skype or chat based direct communication
- **Community**
 - Wells Fargo
 - Parents
 - ✦ Create a positive feedback loop between Felipe and his parents
 - Friends
 - ✦ Celebrate big purchases and goal progress towards them

Benefits to Felipe



- Personalized financial tracking and tips
 - Integrated with his student account
 - No more nagging about saving, get actionable advice
 - Direct access to individualized guidance and support
- Give people a way to celebrate wins together
 - Optionally share goal completion and budget progress
 - Easy feedback loop between bank, parents, and Felipe
- Access to domain knowledge
 - Wells Fargo is your trusted advisor
 - Regular financial checkups via Skype or in person

Benefits to Wells Fargo



- Industry Leadership, (re)defining what a bank's role is in Felipe's financial health and development
- Better insight into Felipe's goals and values
 - Know your customers better
- Community
 - Wells Fargo communicates directly to friends, family, and Felipe in a way that's relevant to them
- Establishing life long relationships