Accelerate *Wealth* for *Women*

J.P.Morgan PUBLICIS.SAPIENT

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YOUR BRIEF

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Core Team



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Executive Creative Director - Group Vice President

Your Brief

Your Brief

POSITION JPMAM AS THE #1 ADVOCATE FOR HELPING WOMEN ACCELERATE THEIR WEALTH

Who are we talking to?

1.

Women

All potential female investors.



But ensuring we cater to different needs...



2.

Financial Advisors

90% of which are men.



3.

The Media

Who can help shape opinions.



4.

And finally everyone else



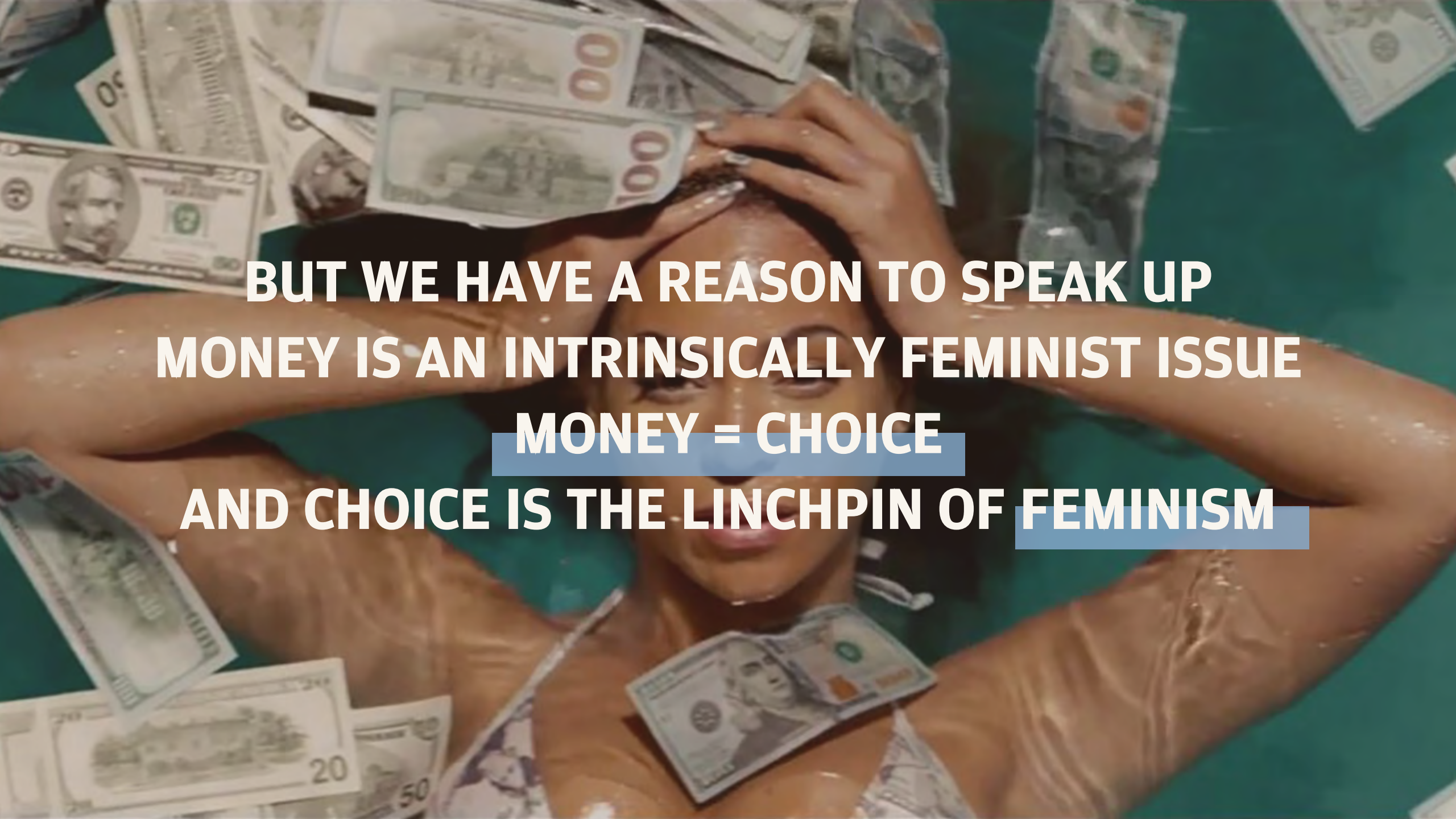
The Why



THIS IS THE ‘YEAR OF THE WOMAN’



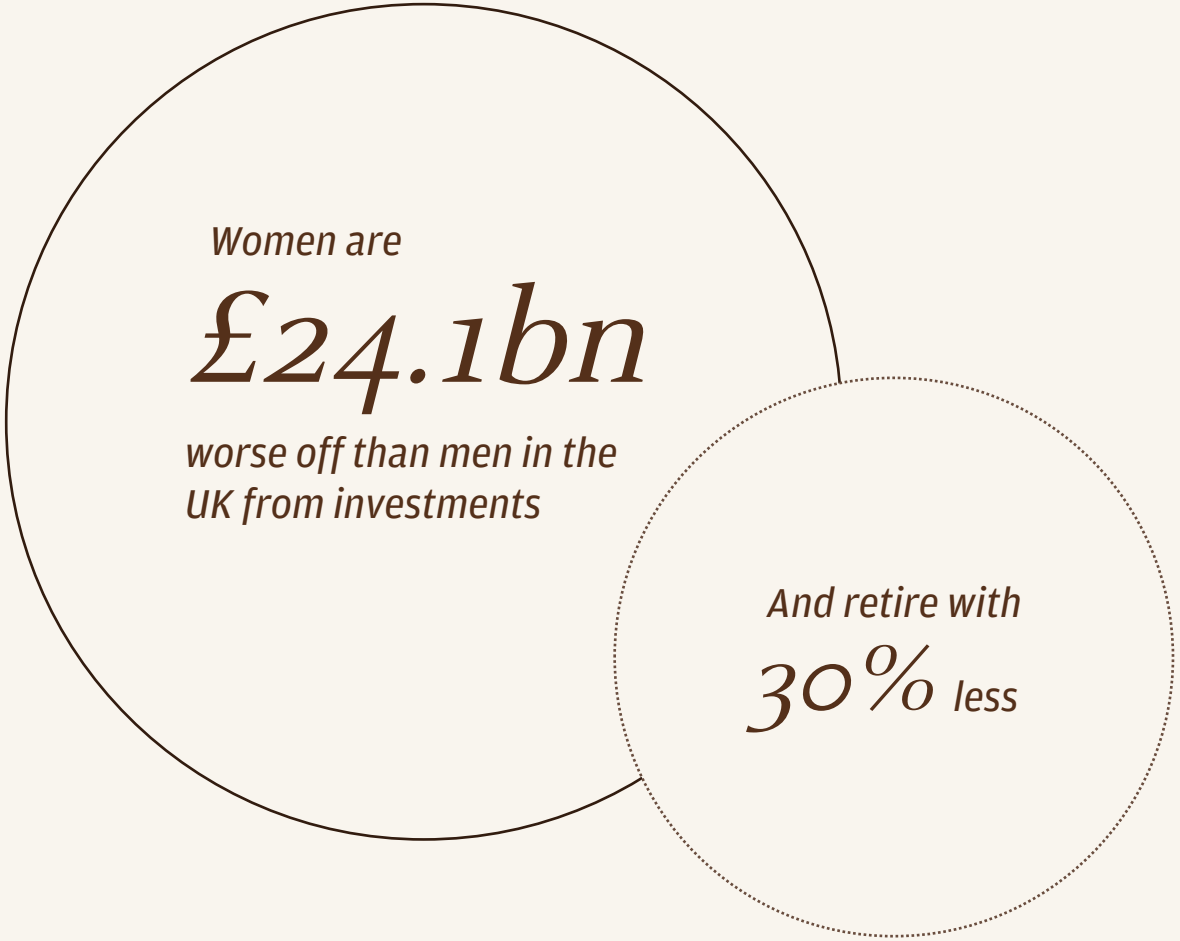
BRANDS ARE CAPITALISING ON THE MOVEMENT BUT MANY ARE GETTING IT WRONG


BUT WE HAVE A REASON TO SPEAK UP
MONEY IS AN INTRINSICALLY FEMINIST ISSUE
MONEY = CHOICE
AND CHOICE IS THE LINCHPIN OF FEMINISM

The Pay Gap is already firmly on the agenda.

But it's just a part of the picture.

Whatever women earn, they're still losing out.



Translating to

c.£375bn

nationally



Women in the UK have on average

c. £24,808

in investable assets

If we get more women investing, we can help them close the Wealth Gap, boost the economy, and in turn, make Financial Advisors successful.

It's win-win.

Our Cause

CLOSE THE WEALTH GAP

The What

We need to

MAKE A SHIFT!



01. IN CULTURE

It starts in the Home



29% of Millennial women said their parents showed them how to grow wealth, vs. 37% of men.

And it continues in the Media



65% of money articles in women's magazines define women as excessive spenders.

70% of articles aimed at men emphasise money as a masculine ideal, encouraging success, growth and 'getting ahead'.



02. IN THE INDUSTRY

COMMUNICATIONS ARE FAILING TO CONNECT.
AND THE SAME GOES FOR THE EXPERIENCE.
INVESTING IS SEEN AS OVERLY COMPLEX,
AND RISKY.

All this results in

APATHY AND PARALYSIS

We need to shift

APATHY INTO ENGAGEMENT AND PARALYSIS INTO ACTION

The How

Strategic Intent

DEMOCRATISING WEALTH

Wake up the world to the hidden Wealth Gap.
Demonstrate the potential of investing for closing it.
Mobilise women and the industry to join the movement.
Take part in an inclusive world of investing with JPM.

Our Principles

1. **DON'T 'PINK AND SHRINK' IT**
2. **DEVELOP A MORE INCLUSIVE BRAND WORLD**
3. **DEMYSTIFY IT, BUT NOT JUST FOR WOMEN**
4. **MAKE IT MORE RELEVANT**
5. **DON'T ADDRESS ALL WOMEN AS ALL ONE TYPE**
6. **BREAK DOWN THE SENSE OF RISK**
7. **OFFER BETTER RELATIONSHIPS**
8. **DON'T PERPETUATE OR CREATE MORE STEREOTYPES**

A new Positioning.
A new Journey.

Brand Talk & Walk

INVESTED IN EQUALITY

Brand Talk & Walk

INVESTED IN EQUALITY

We are on a mission and we want everyone to join us and get involved.
We believe that, together, we can achieve a new level of equality by closing the wealth gap between men and women.
For everyone's benefit.
Let's all be **Invested In Equality**

Big intentions made clear


LET'S CHANGE OUR FINANCIAL TIMES
Show that women investing is good news
In the rough
Andrew Hill: the world of golf is stifled by stuffiness
Gold hits lo
Tuesday 21 July 2015
Bryony Gor on
Every grow up nee
this Pixar film
Telegra

Changing the Times

"If women in the UK invested the same amount as men then £100 Billion would be directed to the UK Stock Market."
- Forbes

Financial times need to change and change for the better.

So what better way to bring attention to our cause than to change the colour of a financial icon.






ADVERTISMENT
ADVERTISMENT
FINANCIAL TIMES
Why you should feel blue about the Gender Investing Gap
- Page 2
Let's change our financial times
jpmorgan.com/investedinequality
#InvestedInEquality
J.P.Morgan

Mobilising women.
Motivating women.



WEALTH GAP WARRIORS

Kick-start a movement that unites and empowers like-minded people

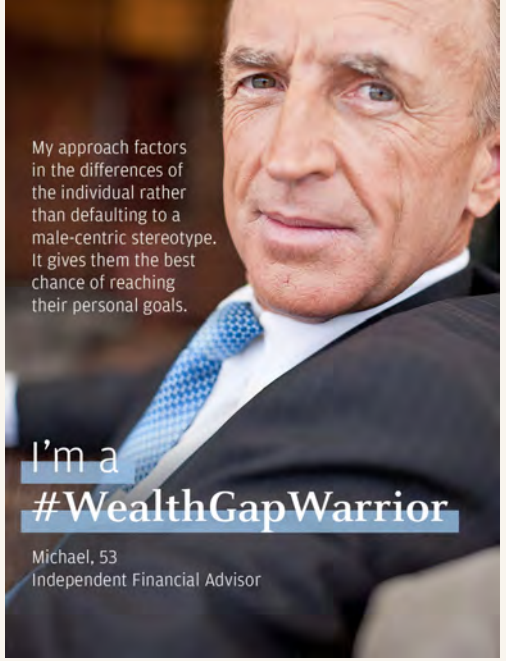
Wealth Gap Warriors

To cut through the apathy we need an attitude. One that is inspirational and aspirational. One that can win hearts and change minds.

Whether it's a financial advisor or a woman looking to invest, we will instill a common goal, to help close the Wealth Gap between men and women.

Are you A #WealthGapWarrior?









Seeding the movement. Starting the conversation.








How women can invest their way to a future without the Gender Wealth Gap | Vicki Robin
HOW DID WE GET HERE?
2:52 / 11:28

A Taste of Trading

We need to change the conversation both online and offline.

'A Taste of Trading' are pop-up events where would-be #WealthGapWarriors can get a taste of the investing world in a social and relaxed atmosphere by mingling with like-minded women and friendly Financial Advisors.



Dialling up the attitude





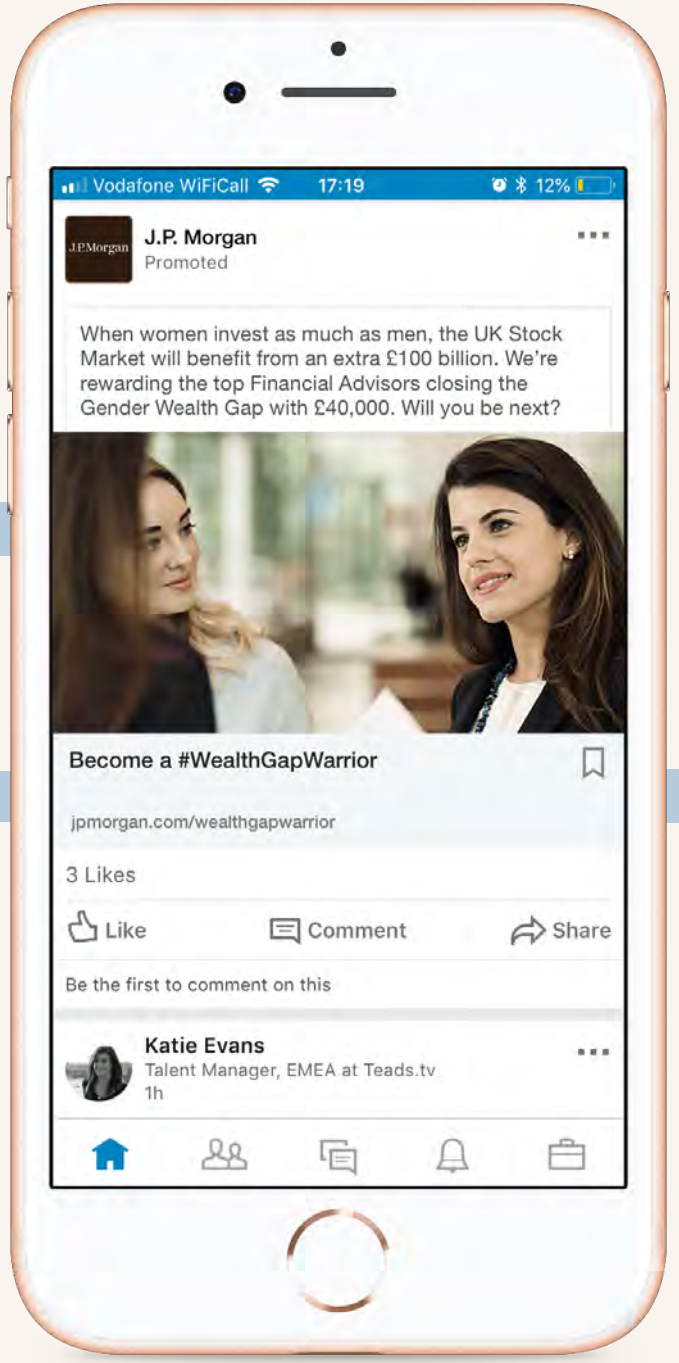

I'M WELL
TURNED OFF
#WealthGapWarrior
J.P.Morgan


I'M WELL
PISSED OFF
#WealthGapWarrior

Advisors Outreach

If women started to invest it would be a huge boost to the economy. A win-win for FAs.

To further incentivise them, we will create the Wealth Gap Reward – a £40,000 cash prize for the top 100 #WealthGapWarrior Financial Advisors who acquired new female investors.



Empower & Educate


THE INCLUSIVE
A bespoke portal to build confidence and end the confusion

The Inclusive

Let’s build an online destination to demystify the world of investments, inspire our audience to start investing and celebrate those who are helping to close the Wealth Gap.

Savvy and progressive, it will be the perfect partner for women wanting a brighter financial future.



The Inclusive – *Invested in Equality*



Introducing a socially responsible way to start investing

You could be investing in mutual funds with companies that adhere to your social, moral, religious or environmental beliefs.

READ MORE

01 —— Introducing a socially responsible way...

02 —— J.P. Morgan in Bournemouth

03 —— The Economic Impacts of Natural Disasters

The Daily



The Daily Briefing:
A round up on today's top stories.

34 MINUTES AGO



How you can close the Gender Wealth Gap

1 HOUR AGO



How to start investing with Amanda Steinberg.

2 HOURS AGO

The Daily



The Daily Briefing:
A round up on today's top stories.

34 MINUTES AGO



How you can close the Gender Wealth Gap

1 HOUR AGO



How to start investing with Amanda Steinberg.

2 HOURS AGO



5 tips from motivating women dominating the investment world

1 DAY AGO



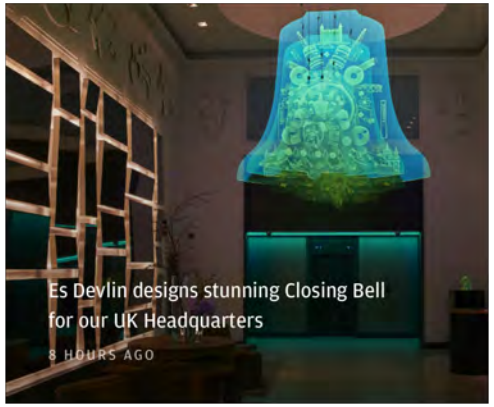
Vicki Robin shows us how she got millennials investing

2 DAYS AGO



A few principles on how the new generation will invest.

2 HOURS AGO



Es Devlin designs stunning Closing Bell for our UK Headquarters

8 HOURS AGO



THE FINDA

Matching the right FAs with the right clients for better relationships

FindA

73% of women feel Financial Advisors don’t understand them.

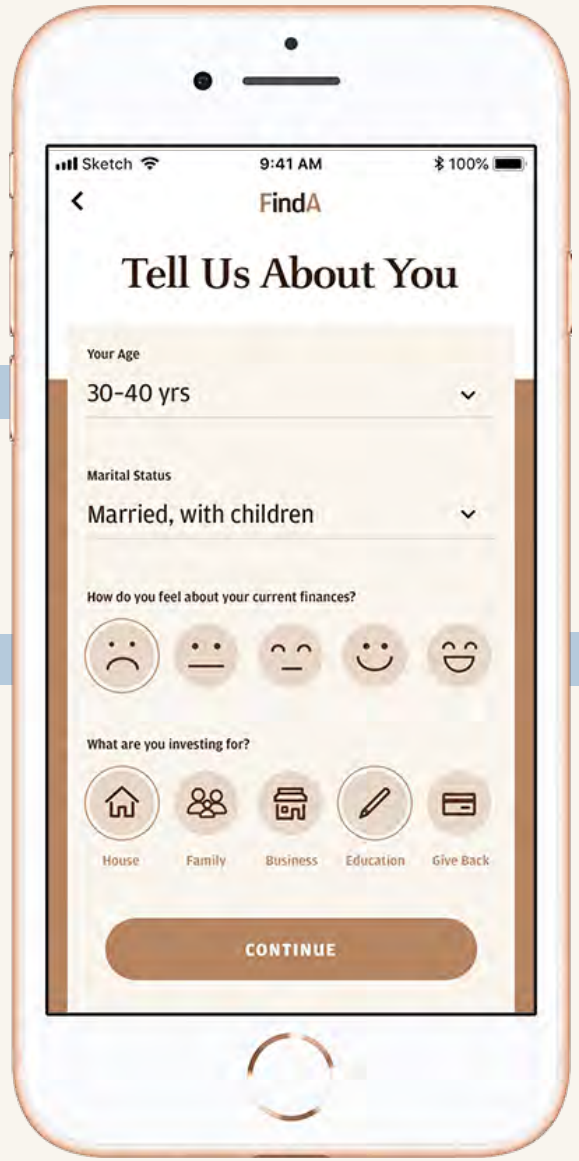
Enter FindA – a Yelp-like experience where women can research, discuss, and find their ideal financial advisor.



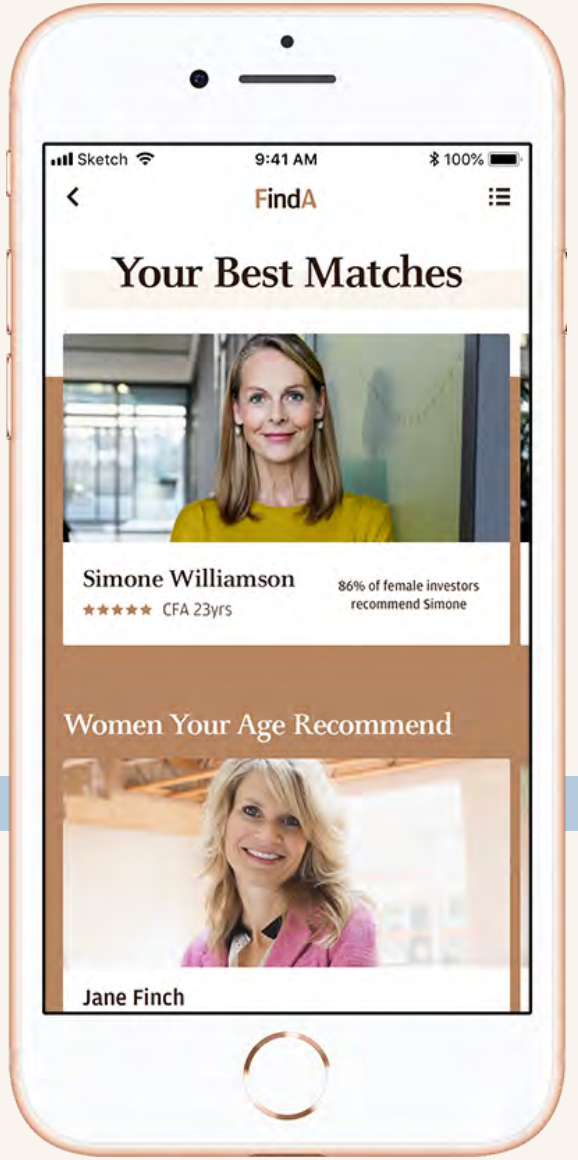
Intro page
Warm & welcoming



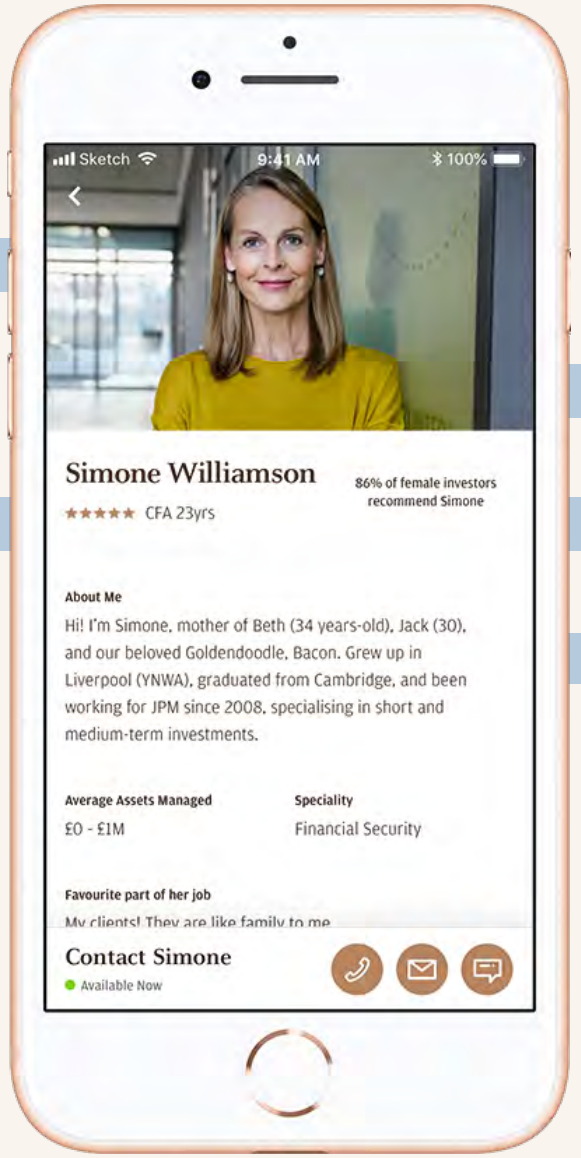
The profiler
Quick & intuitive



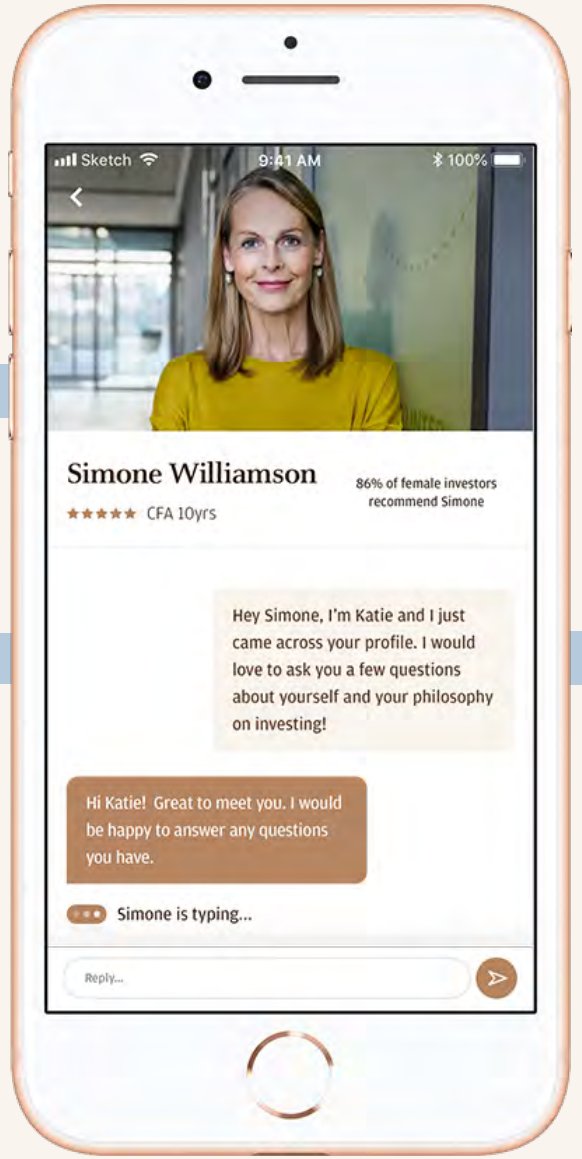
The match
Relevant & reassuring



Bio page
Authentic & human

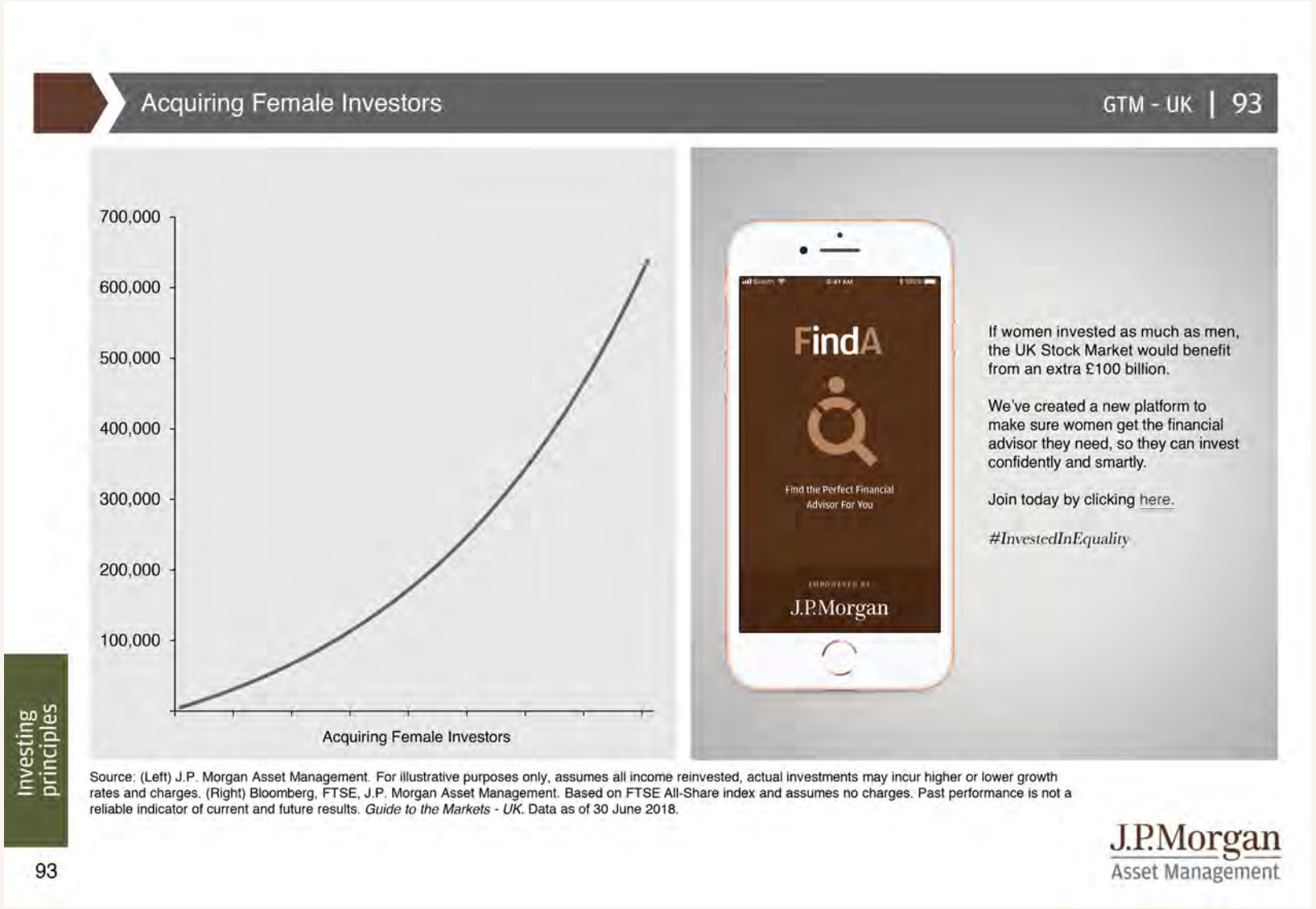


Real-time chat
Accessible & helpful



Advisors Outreach

FindA will be advertised in currently distributed materials like Guide to the Markets which many JPM FAs and IFAs read on a weekly basis.




THE INVESTOR TESTER
Test drive investments with our Google Home advisor

The Investor Tester

The fear of losing money is a key barrier that stops women from investing.

We will create a virtual experience for the risk averse so they can experience the world of investing in total safety from the comfort of their own home.

Using Google Home, we will turn the virtual assistant into a virtual advisor. A gamified experience to build confidence and convert women into assured investors.




"Ok Google, start Investor Tester."
"Yes, let's do it!"
"Congratulations on starting the Investor Tester. You're a step closer to closing your personal Wealth Gap. Shall we begin?"
"Great! Before we begin your virtual investment, I'll need to know a bit about you. What's your date of birth?"


"Ok Google, what's my investment looking like?"
"Ok Google, how can I increase my returns?"
"Ok Google, what's the difference between bonds and shares?"
"Ok Google, how can I do this for real?"
"Your CONSERVATIVE fund is up 1.3% on yesterday. Would you like to adjust your fund?"
"To increase your funds you can invest more into COMPANY SHARES. However this comes with more risk. Shall we continue?"
"A bond is a contract between two parties. In this case, a company or government. They will issue bonds for investors to buy, which have a..."
"To start investing for real, I can put you in touch with a Financial Advisor. Would you like me to continue?"


MUTUALII
Discover the benefits of investing, together

Mutualii

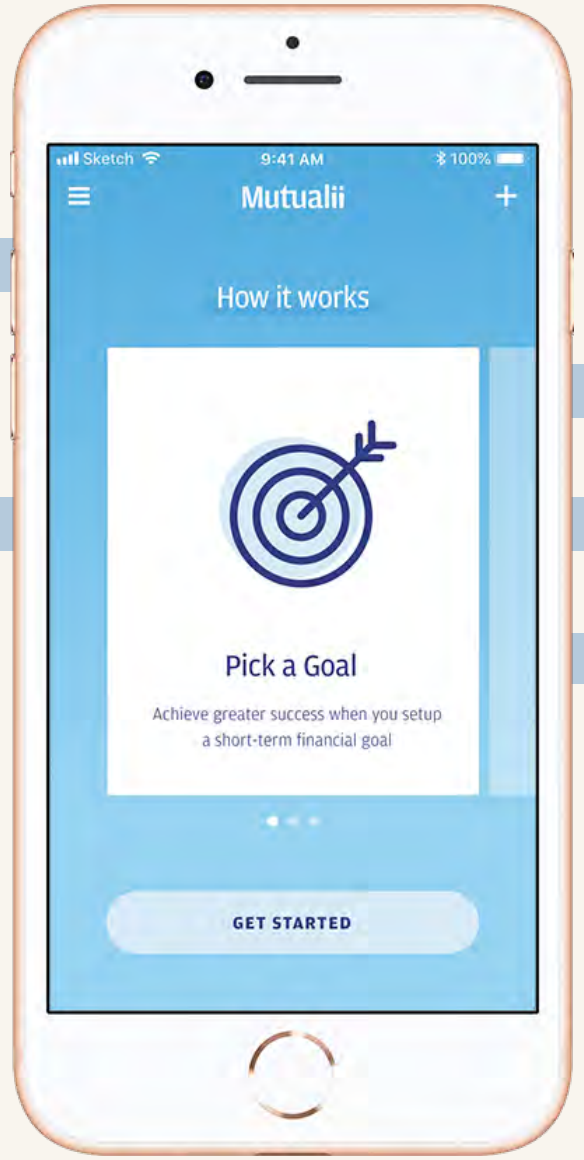
Women feel safer, more supported and more confident with a sense of community.

So when it comes to getting women to invest, community is key.

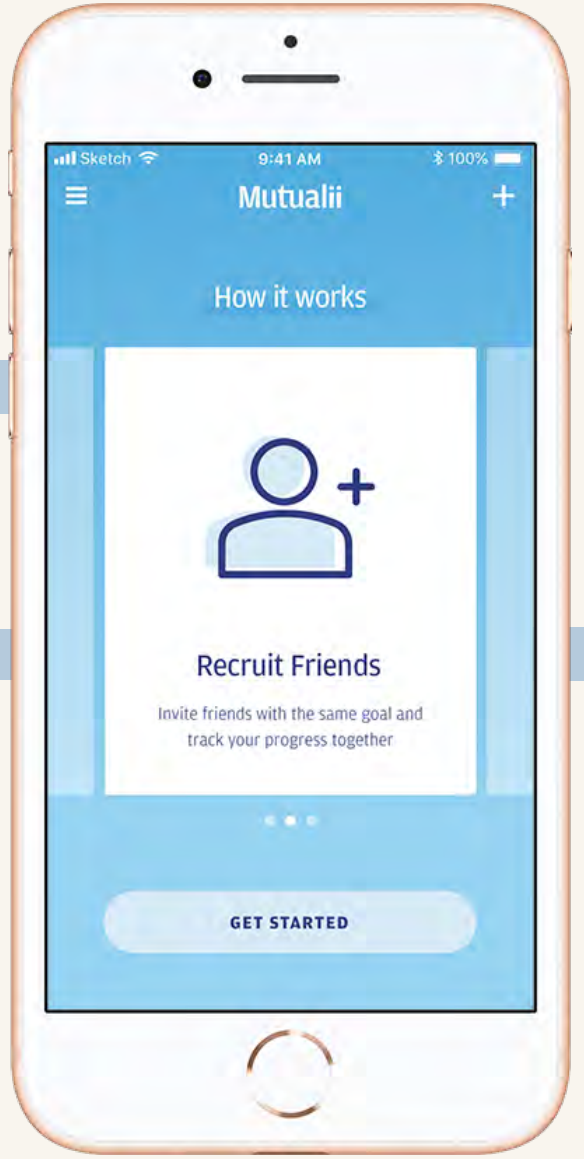
We will launch a platform that will allow friends to come together and give each other inspiration and support to make their investment goals a reality.



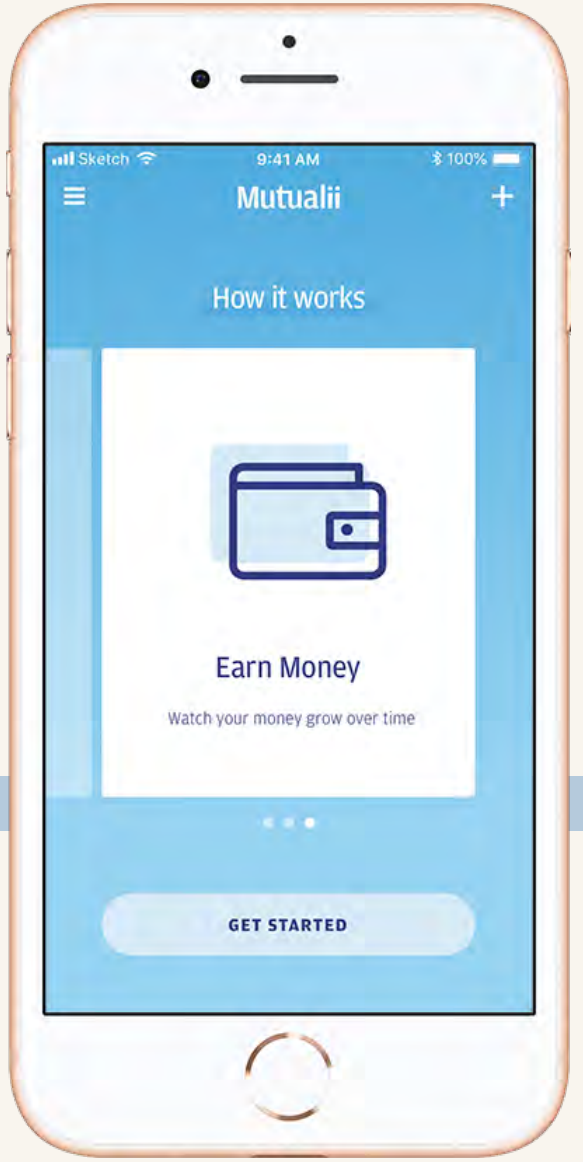
Get a goal
Tangible & personal



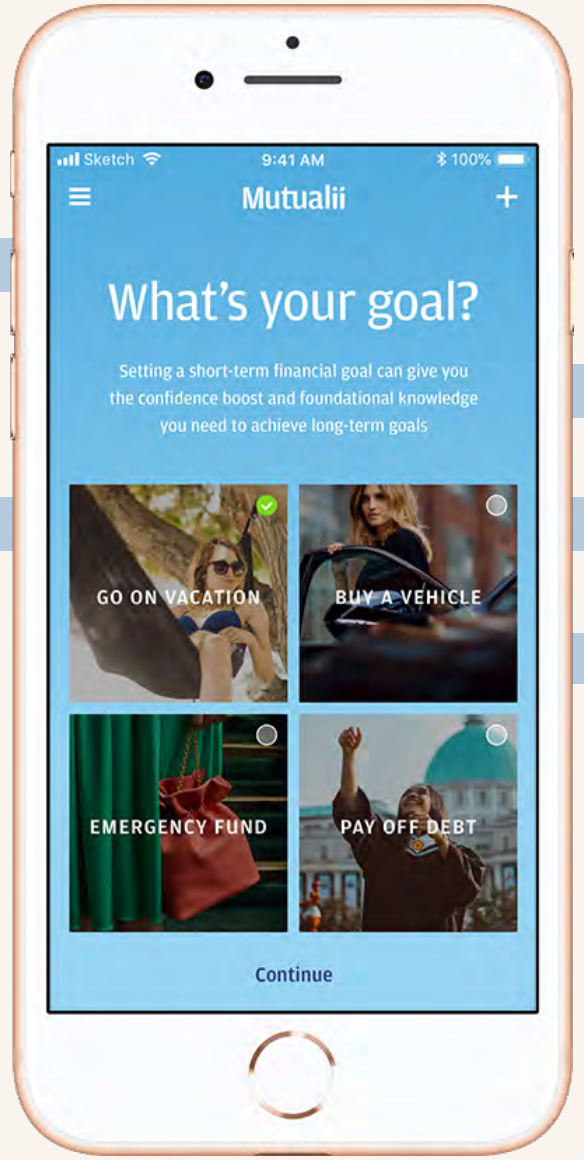
Add friends
Motivating & fun



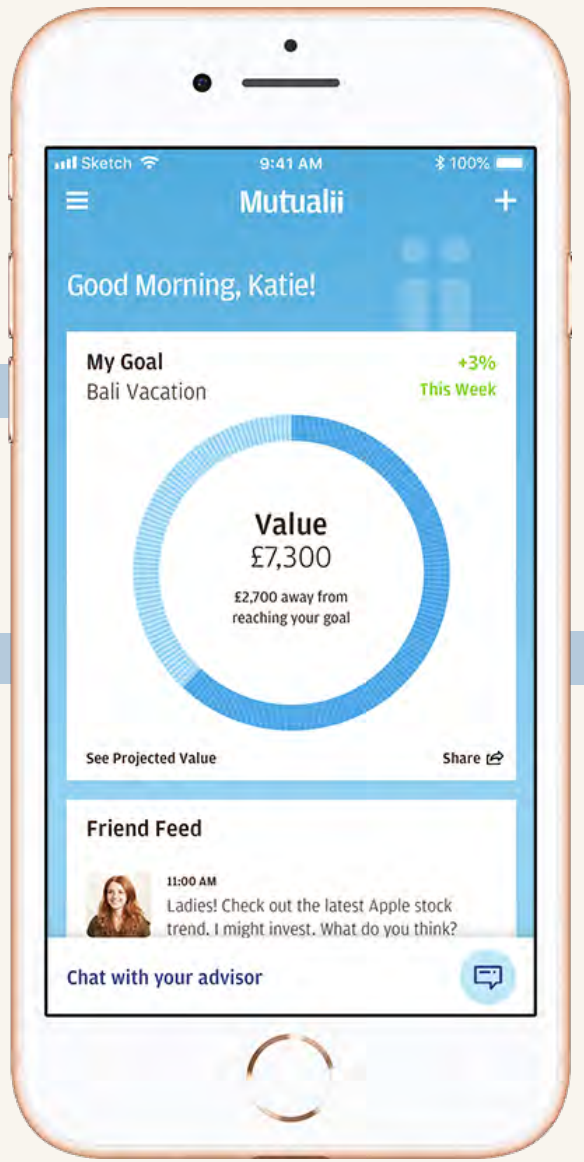
Close the Wealth Gap
Progressive & rewarding



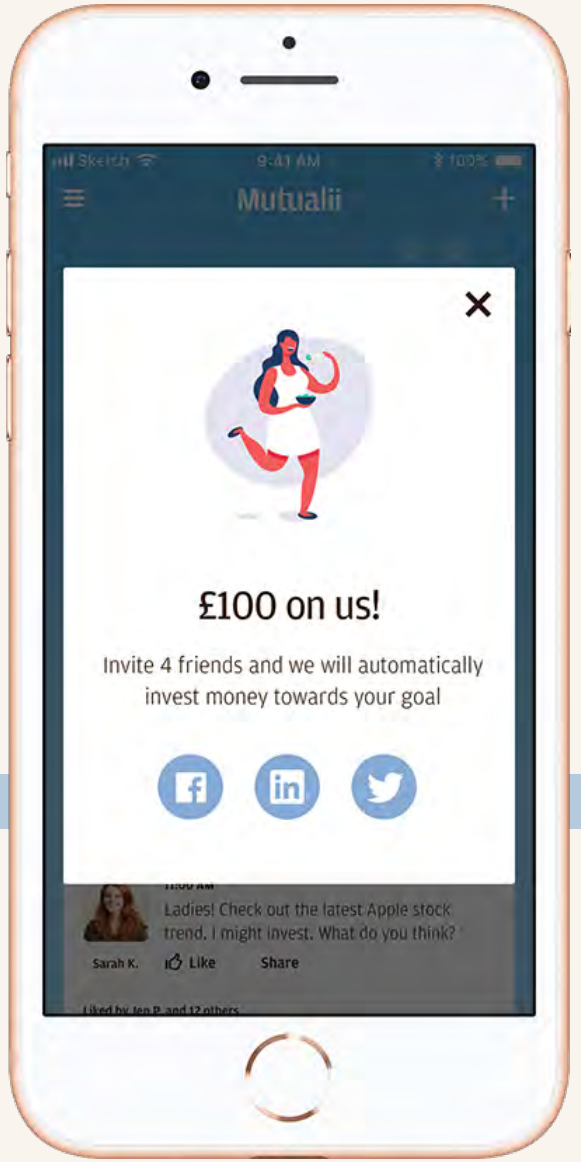
Start small
Build confidence & knowledge



Progress page
Monetary & social encouragement



Monetary incentive
Member get member



Celebrate success



THE CLOSING BELL

Let's ring in and celebrate change

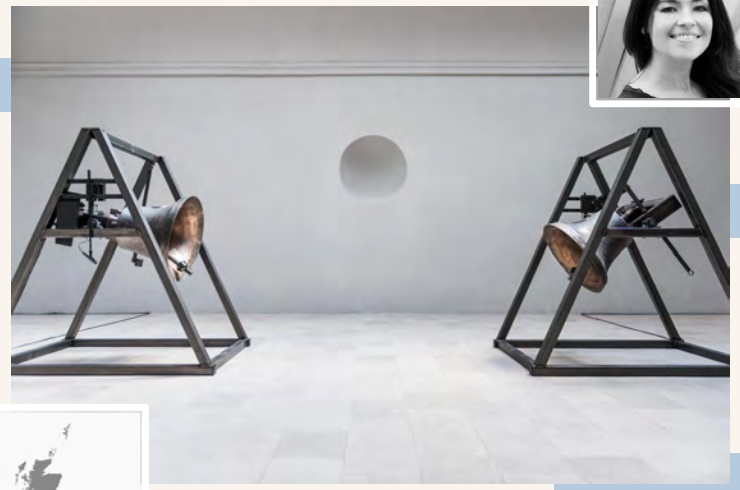
The Closing Bell

The Closing Bell is a bell that rings to signify the end of a trading session at a Stock Exchange.

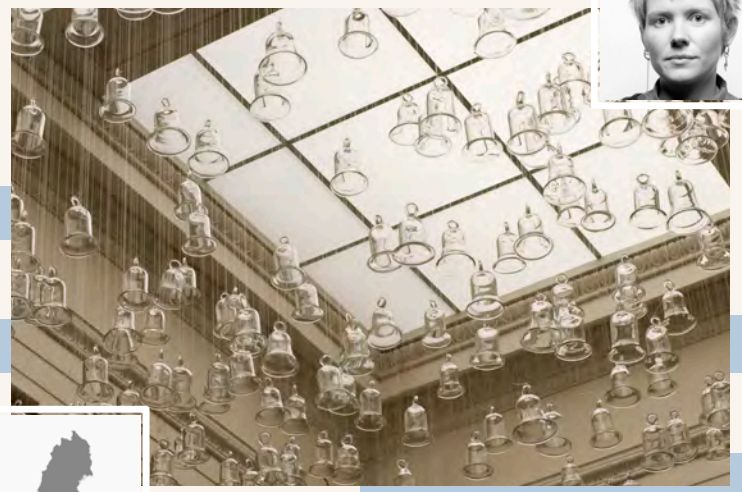
Our ‘Closing Bell’ will ring to signify and celebrate key milestones in Closing the Wealth Gap for Women.

Built as artistic installations, when they ring, they will create engagement worthy of the cause they represent.



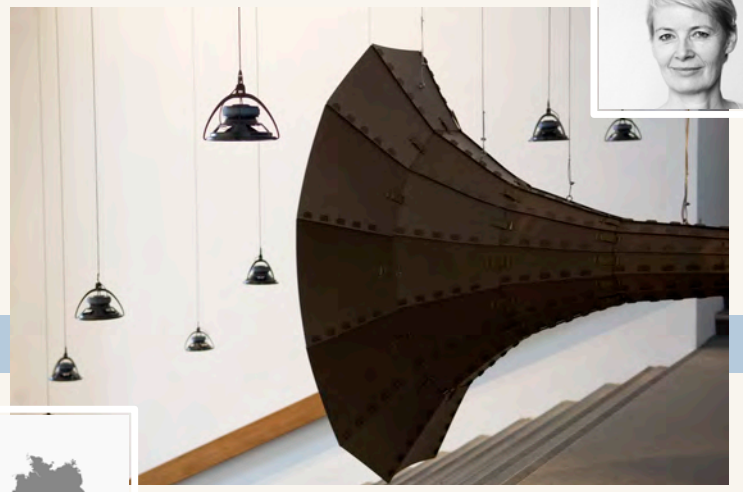














FINANCIAL TIMES

BBC

BUSINESS INSIDER

DAGENS NYHETER.

Handelsblatt

Our Why

CLOSE THE GENDER WEALTH GAP

Our What

SHIFT APATHY INTO ENGAGEMENT, PARALYSIS INTO ACTION

Our How

INVESTED IN EQUALITY

The beginning of something bigger

Brand Talk & Walk

INVESTED IN EQUALITY

In the FTSE 100 there are as many CEOs named David as there are women


WINVEST 100
A Stock Exchange Index invested in equality

WINVEST 100

Companies with more women in leadership roles are proven to be significantly more successful. Fact.

Yet just 2.2% of all venture capital in the US went to companies founded solely by women.

Let's redress the balance.

Let's curate a new Index – the WINVEST 100 – a fund that includes the top 100 performing companies that have a high/equal number of women in senior leadership roles.



QUESTIONS?

THANK YOU

J.P.Morgan PUBLICIS.SAPIENT