



How Money Personality works for Super Funds

The Money Personality engagement and education tool can be used in a variety of ways with superannuation funds and their members.

The simplest option is to have a link to the Money Personality website letting members know that this tool exists.

A more active and valuable application is where a super fund uses the Money Personality tool to find out what their members Money Personalities are, as described through the animals. Knowing your member's Money Personalities enables the fund to better communicate, retain, attract and engage with their membership.

Further, providing the Money Personality tool to members demonstrates you genuinely care about their understanding of how they personally relate to money and how they can influence their financial success.

Once your members have completed the Money Personality quiz they will be provided with a personal web address that will store their Money Personality report indefinitely. We believe this is important as many people like to come back and reread their reports and share them with their spouse and other significant people in their lives.

You can also access any feedback provided by your members which indicates to what extent they agree with their Money Personality Report.

In an industry where it can be difficult and/or costly to stand out from the crowd, this is a simple tool that can provide an immediate point of difference.

As every super fund is different, please contact us to discuss the needs and objectives of your fund, and how the My Money Personality tool may be able to assist you.

Enquiries to:

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