

Consumers are looking for financial education

Be the source they turn to.



More and more account holders are looking for advice-driven relationships with their financial institutions.

In 2015, only 21 percent characterized their relationship with their financial institution as advice driven, a 28 percent drop from 2014.¹

This trend represents a clear opportunity for your bank or credit union, given that 26 percent of consumers are willing to pay to have their financial institution work with them to build and monitor a budget. Even more would welcome end-to-end assistance with buying a car (44 percent) or home (43 percent).²

How can you provide the financial education your account holders want?

Harland Clarke ConsumerU.

With ConsumerU, your financial institution can provide useful information to help your account holders make financial decisions that are right for them – such as buying a car or home, choosing a credit card and saving for education or retirement.

At the same time, you will attract new account holders, increase cross-sell opportunities and enhance customer satisfaction.

1. Accenture, *Banking Shaped by the Customer*, 2016
2. Ibid.

Offer account holders a resource for financial education. Promote financial literacy.

ConsumerU delivers a broad array of online content that covers more than 50 financially focused topics, including:

- Consumer Protection
- Credit and Loan
- Financial ABCs
- Planning for the Future
- Small Business Savvy
- Youth Education

Content is also available on current housing issues – such as mortgage financing, foreclosure and HARP. Convenient financial calculators and worksheets help account holders with budgeting and planning.

Key attributes

Features

- Choose training topics and modules that fit your needs
- Customize with your financial institution's logo, colors, etc.
- Advertising / promotional space available for your products and services and to link ConsumerU to your website
- Learning modules available in Spanish
- Financial calculators to help plan for college, save for retirement and more
- Credit union-specific modules available

Benefits

- Integrates with other Harland Clarke products to enhance your lifecycle marketing program
- Helps meet the requirements of the Community Reinvestment Act
- Attracts new account holders
- Increases cross-sell and product awareness
- Builds stronger relationships
- Enhances account holder satisfaction

Engage

account holders

Build

stronger relationships

Increase

product awareness

Enhance

account holder satisfaction

Meet

*the requirements of
the Community
Reinvestment Act*

Ready for a free
demonstration?

Contact Harland Clarke today.

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