



ATHENA

Invest in Yourself

Design Ignites Change

Providing guidance on personal finance
management to university women

CONTENTS

PHASE 1

Research

- Consequences of limited financial education in curriculum
- The truth about women and money
- Understanding the target audience
- Vision, Mission, & Values
- Goals, Strategies, & Tactics

PHASE 2

Brand Identity

- ATHENA: Invest in Yourself
- Brand concept & logo
- Typography & color palette
- Iconography
- Stationery Suite

PHASE 3

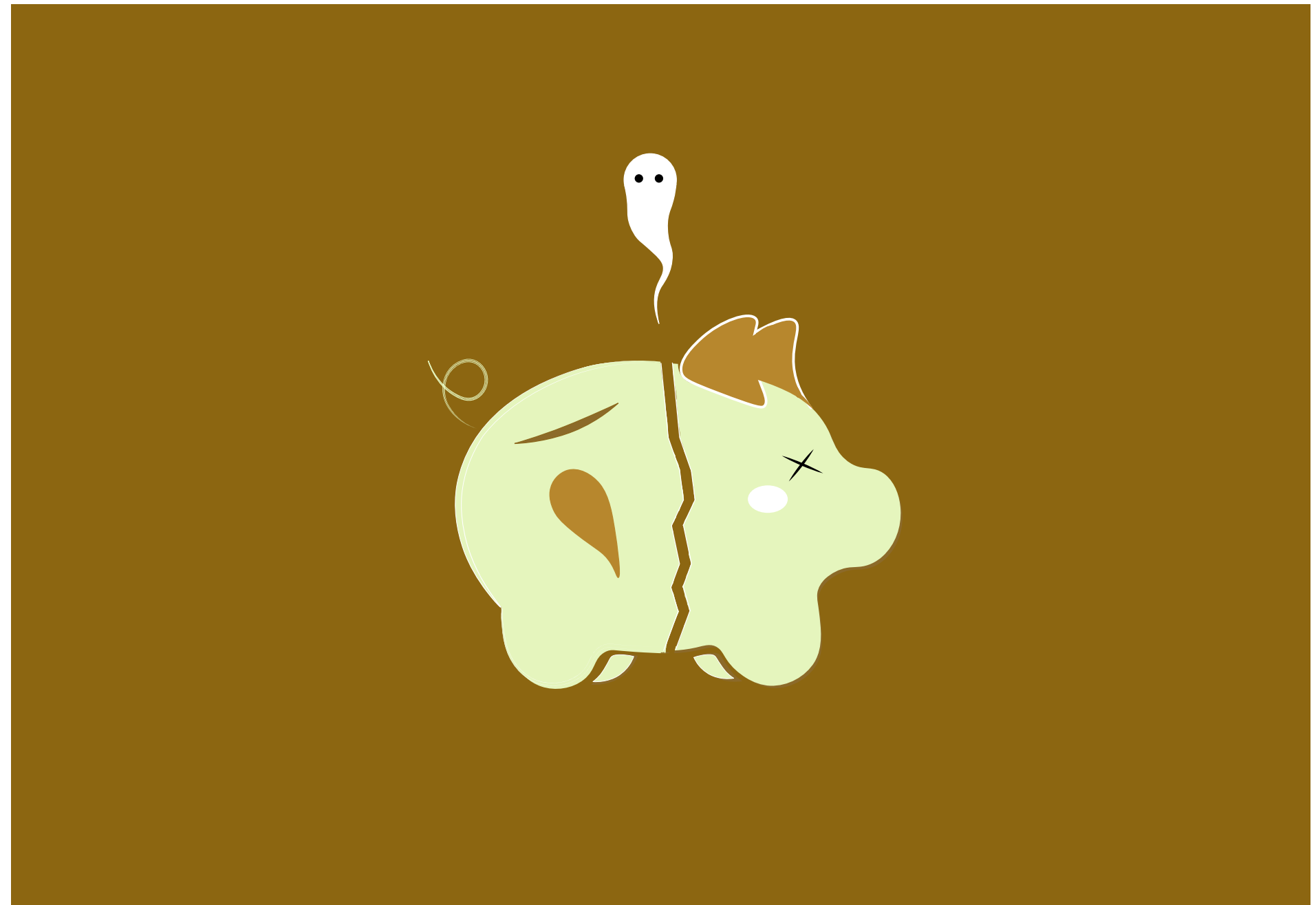
Collateral

- The Athena Financial Planner
- Environmental Implementations
- Social Media Assets
- Finance Workshops for Students
- Website
- PSA

PHASE 1

Research

Consequences of limited
financial education in
college curriculum



PHASE 1

Research

Consequences of limited financial education in college curriculums

- Some of the largest financial media sources including Forbes, Investopedia and The Wall Street Journal report the majority of Americans are not familiar with the ins and outs of the financial system, don't understand financial jargon, don't have adequate savings, a retirement plan, or a consistent strategy for managing their money.
- The lack of financial literacy not only affects the personal lives of individuals; it also causes the economy to suffer by leading to poor financial decisions, increased debt, and reduced investment in growth opportunities.

PHASE 1 Research

The truth about
women and money

Allianz Trade published a study in July 2023. They tested the financial literacy of both men and women in several countries with a simple nine question test.

30% of women had **0-2** correct answers,

21% of men had **0-2** correct answers.

11% of women had **7-9** correct answers,

19% of men had **7-9** correct answers.

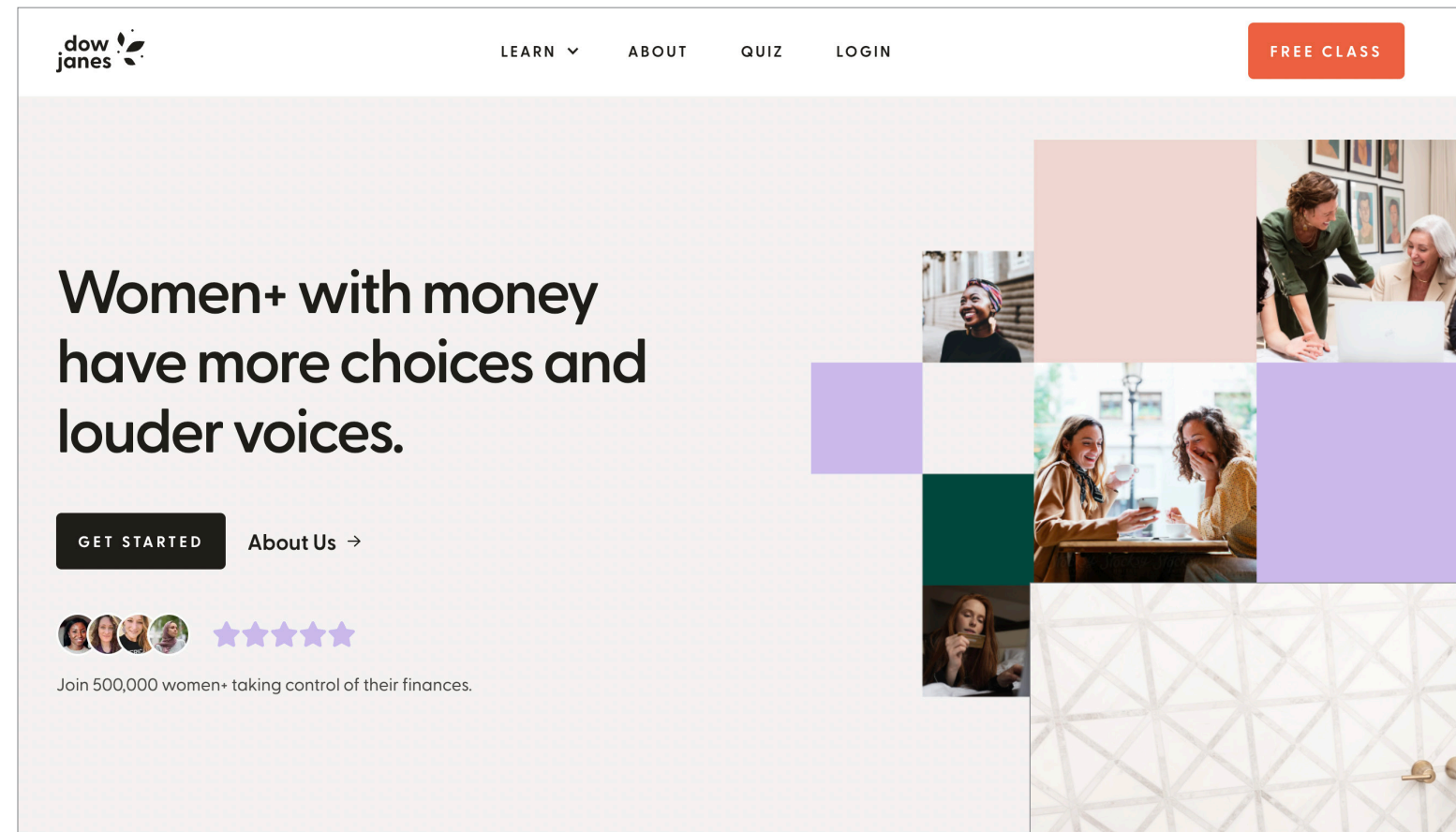
Allianz  data from 2023

PHASE 1

Research

The truth about
women and money

Competitor Organization: Dow Jones



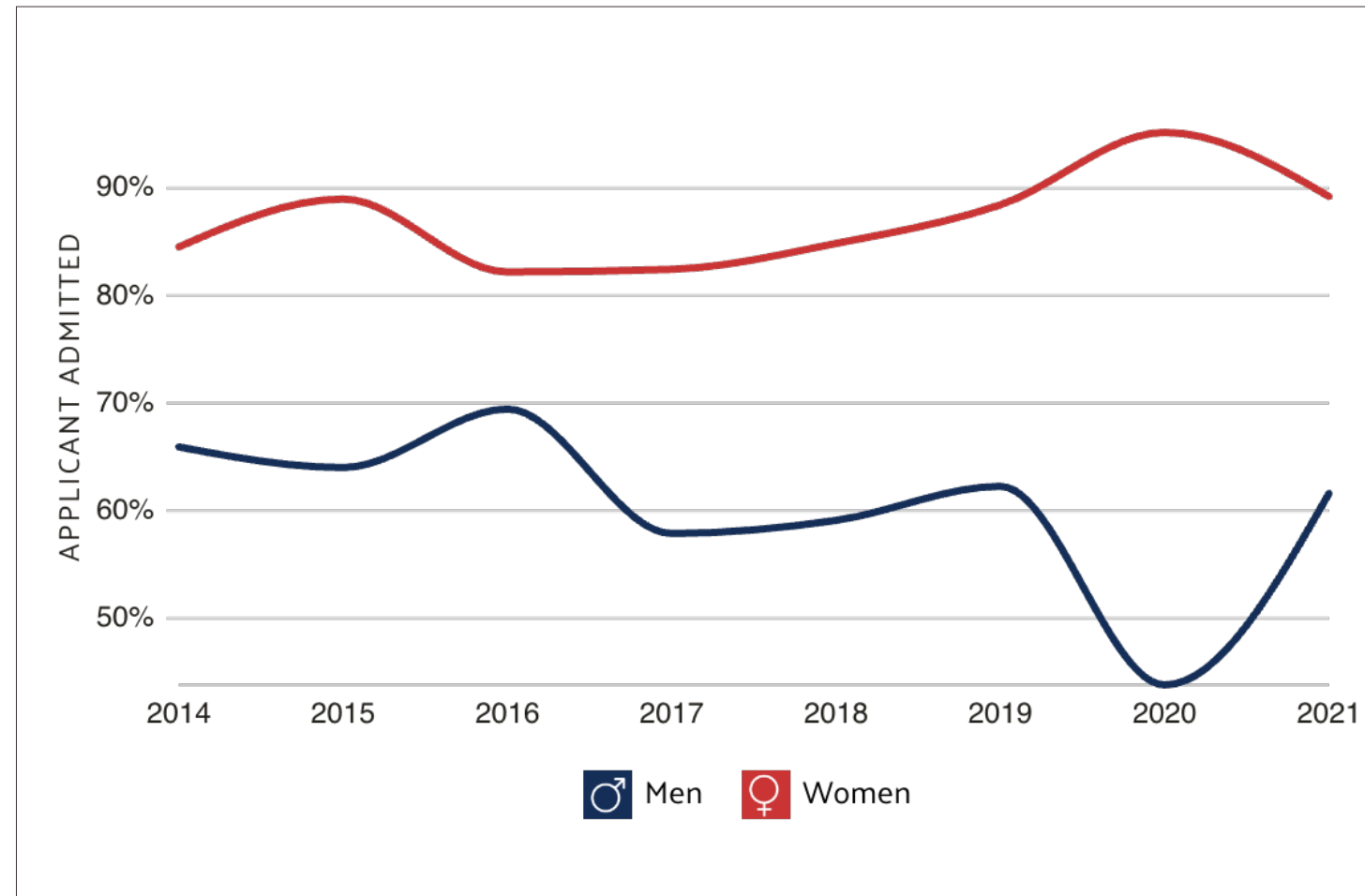
Founders Britt Williams Baker and Laurie-Anne King report women are **5x** more likely than men to live paycheck to paycheck.



PHASE 1

Research

The truth about
women and money



“In 2021, 41.3% of applicants to DMV universities were admitted out of 22.6% who enrolled. This was 100,007 students, 37.3% men and 62.7% women.”

Data from the Integrated
Post-Secondary Fall Enrollment

PHASE 1

Research

Understanding the
Target Audience

Demographic Profile

Age: 19-24

Gender: Female

Religion and Ethnicity: Majority in
DMV schools are White and Asian

Education: High School Diploma,
currently in college

Occupation: Varies, may work as
receptionists, baristas, bartenders,
retail cashiers, administrative
assistants, etc.

Income: Typically minimum wage,
\$15 an hour



PHASE 1

Research

Understanding the
Target Audience

Success Story: *Angel Thompson*

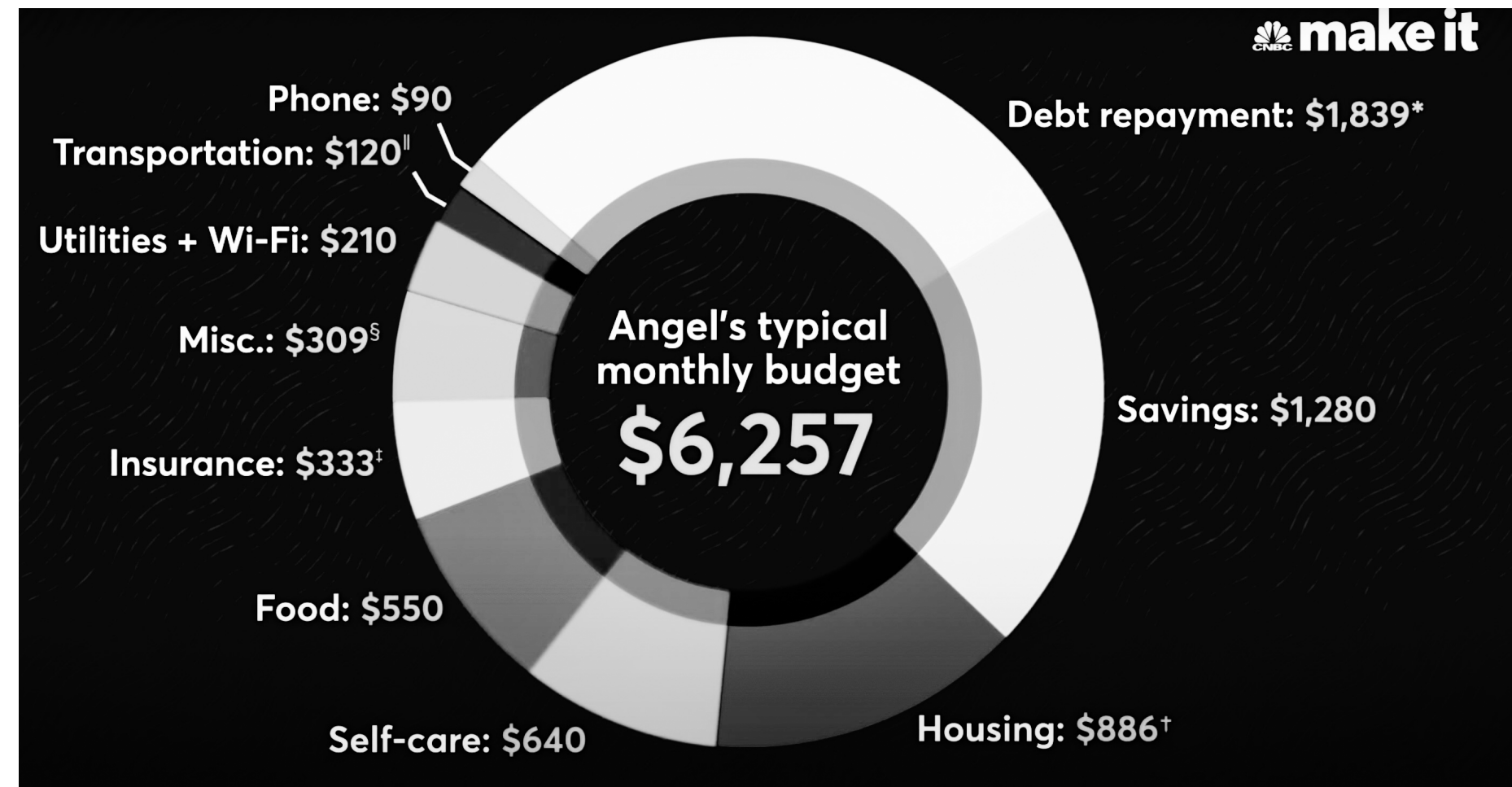


PHASE 1

Research

Understanding the
Target Audience

Success Story: **Angel Thompson**



PHASE 1

Research

Vision, Mission,
and Values

Vision

Women who graduate from universities in the DMV area have the knowledge, skills, and confidence to manage their finances.

Mission

Educate women approaching graduation about the importance of solid personal finance skills. Inspire them to create an investment portfolio, open a retirement account, build savings, and effectively manage expenses.

PHASE 1

Research

Vision, Mission,
and Values

Values

Individuality.

We are committed to recognizing and addressing the unique needs and situations of each woman we work with, acknowledging their distinct requirements, preferences, and challenges.

Self-Improvement.

We work to improve women's personal lives by promoting financial wellness as a crucial aspect of self-help and self-care.

Productivity.

We know undergraduate women are hardworking individuals who value success and achievement in their fields. They deserve to reap the rewards of their labor.

Support.

We aim to boost young women's financial confidence.

Stability.

Through our outreach, we provide financial education for undergraduate women to lead financially stable lives.

PHASE 1 Research

Vision, Mission,
and Values

Goals, Strategies, & Tactics

- **Goal #1: Educate**

Strategy

Provide a data base of print and digital educational materials women can use at their own convenience.

PHASE 1 Research

Vision, Mission,
and Values

Goals, Strategies, & Tactics

- **Goal #1: Educate**
- **Goal #2: Build Interest**

Strategy

Provide a data base of print and digital educational materials women can use at their own convenience.

Strategy

Integrate financial materials into the audience's everyday environment.

PHASE 1 Research

Vision, Mission,
and Values

Goals, Strategies, & Tactics

- **Goal #1: Educate**

Strategy

Provide a data base of print and digital educational materials women can use at their own convenience.

- **Goal #2: Build Interest**

Strategy

Integrate financial materials into the audience's everyday environment.

- **Goal #3: Provide Support**

Strategy

Offer opportunities for connections between undergraduate girls and financial professionals.

PHASE 2

Brand Identity

Name & Tagline

Athena is the goddess of war, wisdom, and knowledge, who embodied strategy, rationality, and craft.

PHASE 2

Brand Identity

Brand Concept &
Logo



ATHENA

Invest in Yourself

Signature

PHASE 2
Brand Identity

Name & Tagline



Brand Mark: a coin resembling Athena's shield

ATHENA

Invest in Yourself

Logotype: Luxia Display
kerning 140

Tagline: Cormorant Regular
kerning 70



Smallest Acceptable Use:
0.75" x 2.125"



PHASE 2

Brand Identity

Typography & Color
Palette

Logotype

LUXIA

A B C D E F G H I J K
L M N O P Q R S T U
V W X Y Z

Designer: Andrew Herndon

Tagline

Cormorant

A B C D E F G H I J K
L M N O P Q R S T U
V W X Y Z

a b c d e f g h i j k
l m n o p q r s t u
v w x y z

1 2 3 4 5 6 7 8 9 0

Designer: Christian Thalmann

PHASE 2

Brand Identity

Typography & Color
Palette

Body Copy

Montserrat

ABCDEFGHIJK
LMNOPQRSTU
VWXYZ

Designer: Julieta Ulvanovsky

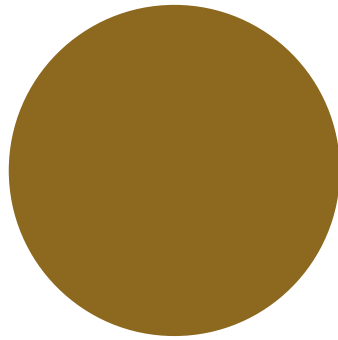
abcdefghijk
lmnopqrstu
vwxyz

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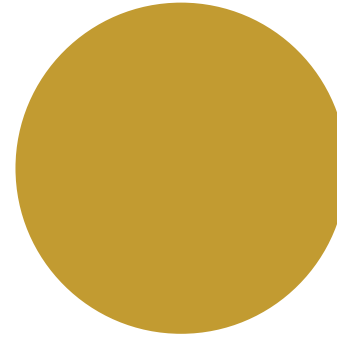
PHASE 2

Brand Identity

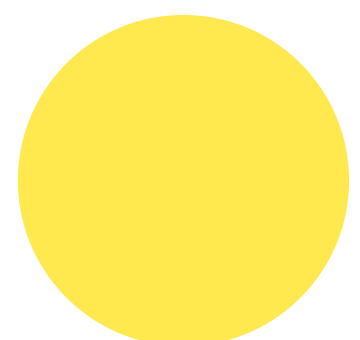
Typography & Color
Palette



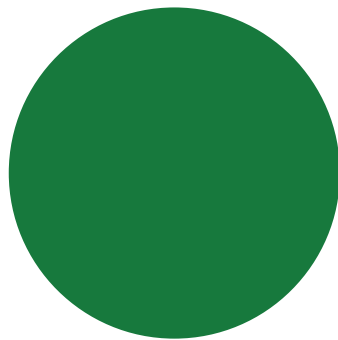
Burnished Gold
8c691e



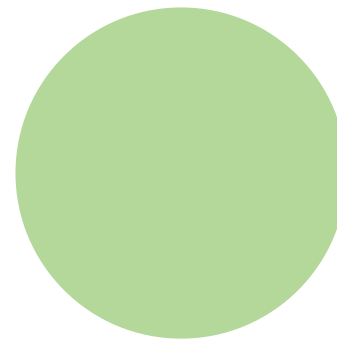
Shield Gold
c29b31



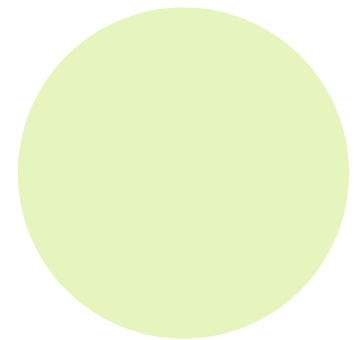
Sunshine
ffe94e



The Color of Money
17793d



Mint
b2d99a

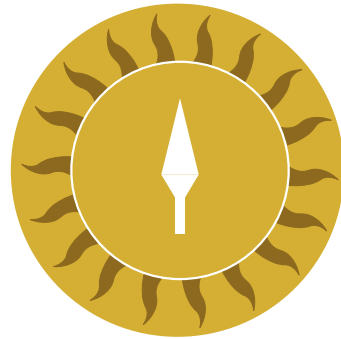


Pale Green
e5f5bd

PHASE 2

Brand Identity


Iconography



PHASE 2

Brand Identity

Stationery Suite: Letterhead



MAY 06, 24

Cia Rodriguez
ATHENA
514 19th Street NW
Washington, DC, 20052

Dear Ms. Rodriguez,

Certain rules must be followed when printing letters on this stationery. The top one-third of the letterhead should be used for the name whom you are sending the letter. The date is positioned flush-left with the baseline 1.5 inches from the top of the page —aligning vertically with the address block. The address block is positioned with one blank line space between the date and the first line of the address block.


The salutation is positioned flush to the left, one blank line below the address with the body of the letter beginning one blank line below the salutation. One blank line should separate each paragraph. Abbreviations and hyphenated words should be avoided.

Four blank lines should be left for your signature between the signature closing and your typed name. If the letter is to run longer than one inch off the bottom of the page, a second sheet is to be used. At least three lines, excluding the signature copy block should be continued to the second sheet.

If the above rules are followed, your stationery will fulfill its function of communicating a message in a clear, orderly, easily read fashion and will serve to enhance your corporate image.

500 17th Street NW
Suite 222
Washington, DC,
20052

Sincerely yours,



Isabel Humphrey
Founder
ATHENA

PHASE 2

Brand Identity

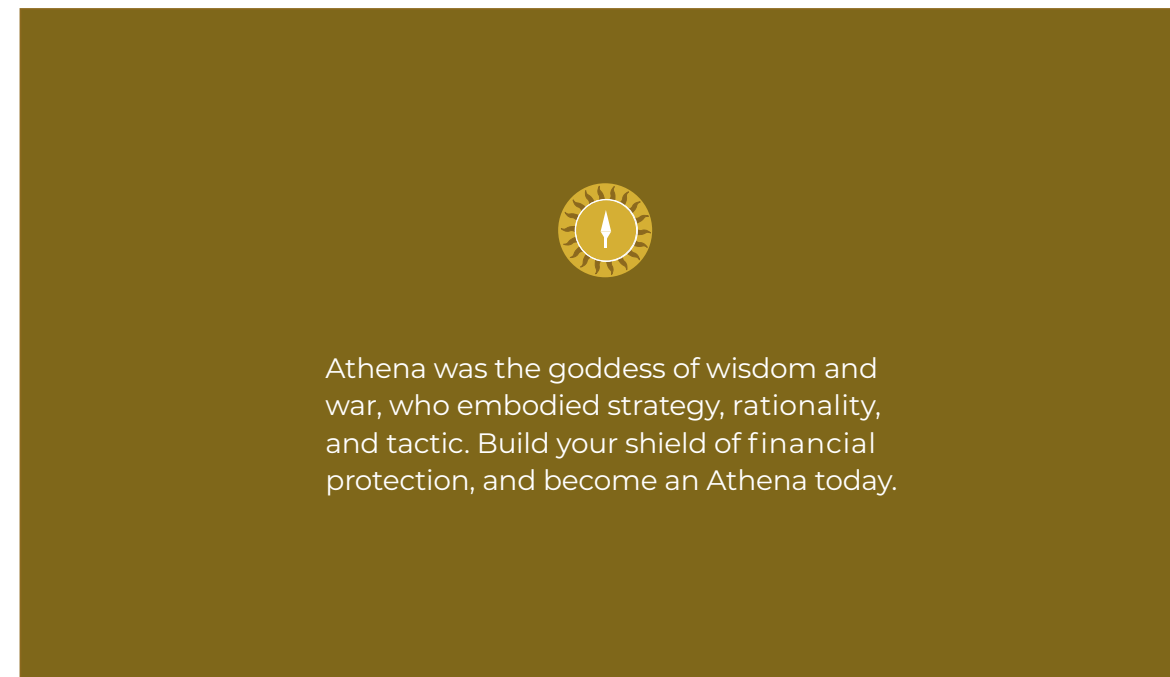
Stationery Suite:
Envelope



PHASE 2

Brand Identity

Stationery Suite:
Business Card



PHASE 3 Collateral

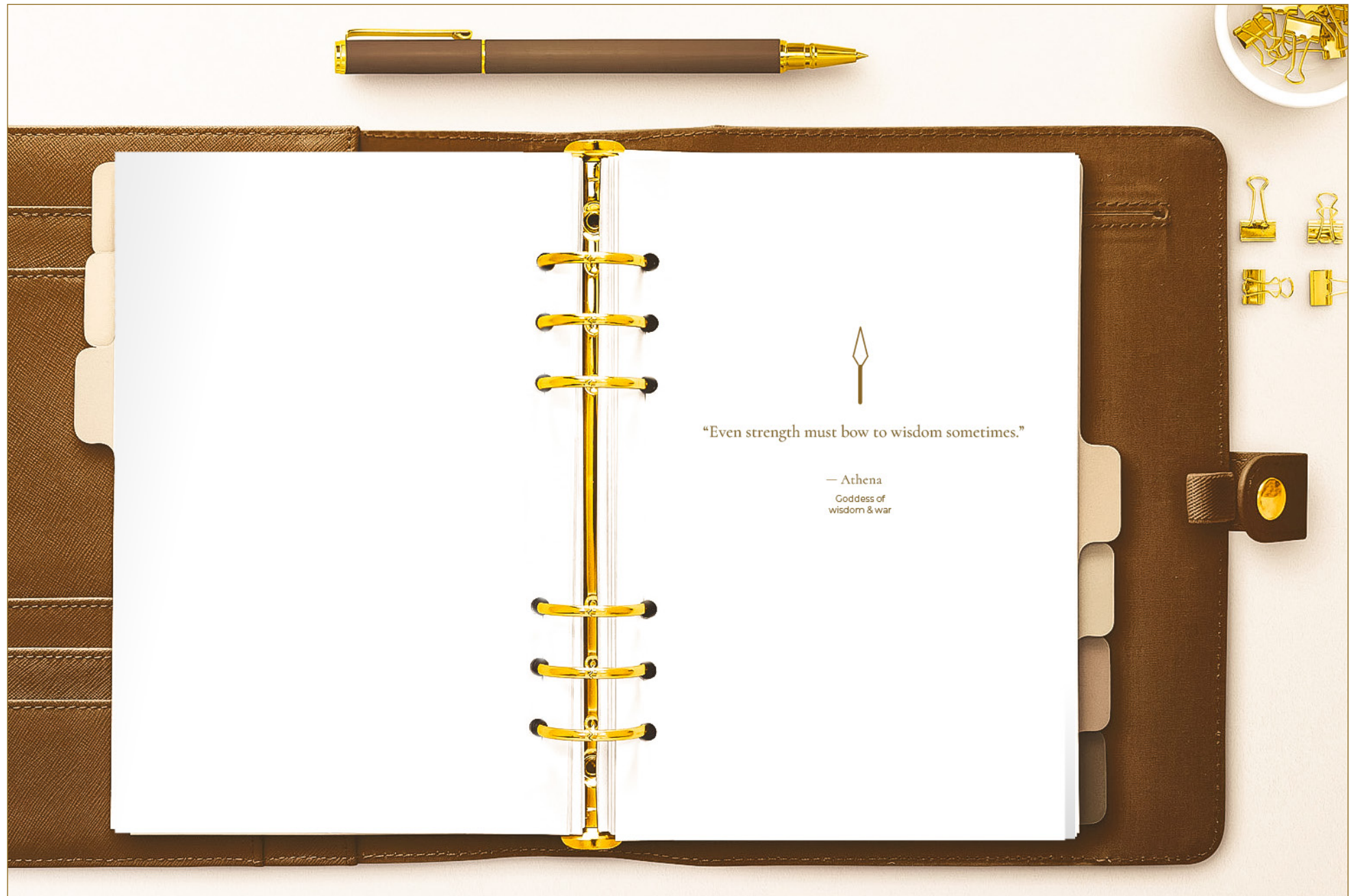
The Athena Financial Planner



PHASE 3

Collateral

The Athena Financial Planner



PHASE 3
Collateral

The Athena Financial Planner



PHASE 3
Collateral

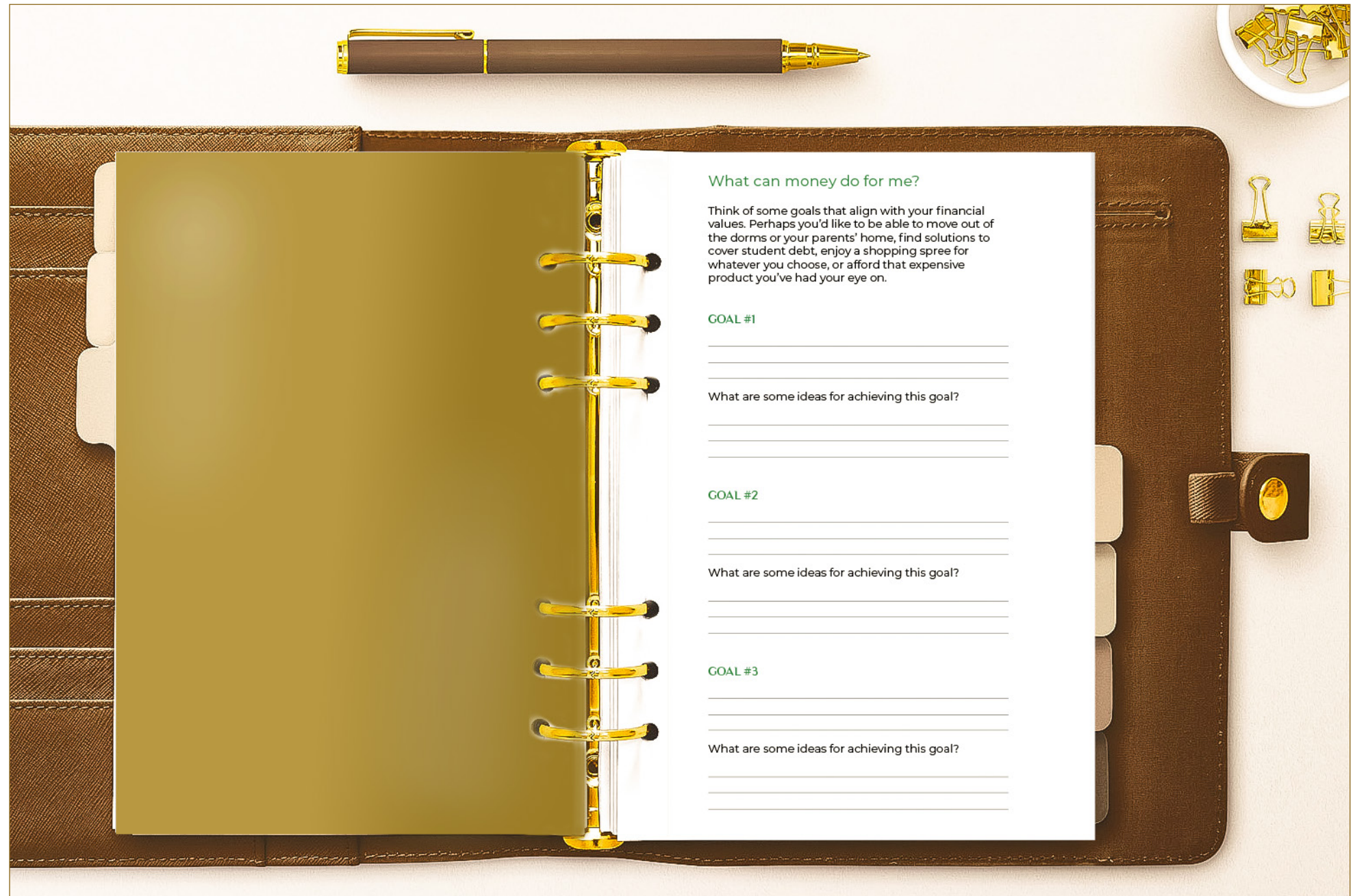
The Athena Financial Planner



PHASE 3

Collateral

The Athena Financial Planner



PHASE 3
Collateral

The Athena Financial Planner

2.1

EARN

Month: _____

Fixed Income

\$

Variable Income

Date	Source	Description	Earned
			\$
			\$
			\$
			\$
			\$
			\$
			\$

Fixed + Variable Income = Total Income

\$

Fixed Expenses

Date	Category	Description	Due
			\$
			\$
			\$
			\$
			\$
			\$

Total Paid

\$

Variable Expenses

Date	Category	Description	Spent
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$
			\$

Total Spent

\$

Fixed + Variable Income = Total Expenses

\$

Total Income - Total Expenses = End Balance

\$

Athena's Tip

Ensure your income surpasses your expenses. Analyze your total income compared to your total expenses and make sure your income is higher. Track your spending and earnings to achieve the desired imbalance. Then, your end balance might look a little friendly!

PHASE 3 Collateral

Environmental
Implementations:
Advertisements



BECOME AN ATHENA

She is the goddess of wisdom and war, who battled life's challenges with logic and strategy.

We are offering fun, engaging workshops for college girls to learn the basics of personal finance. These workshops are intended to prepare women for graduation and beyond.

FREE FINANCE WORKSHOPS!

 April 12 Friday 2-5 PM Workshop Learn How to Earn with Personal Finance	 April 19 Friday 2-5 PM Field Trip Learn Budgeting and Saving with Bank Staff	 April 26 Friday 2-5 PM Workshop Learn to use The ATHENA Planner
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SIGN UP NOW!
athena.org



PHASE 3 Collateral

Environmental
Implementations:
Advertisements

MONEY, MONEY, MONEY...

wish your school lessons
included how to master it?

Mastering effective personal finance skills can greatly enhance self-care and overall quality of life. Investing is not only for CEOs, or wall street bros.

Investment vehicles such as the stock market, real estate, and bonds are for anybody who participates in the economy. Learn effective skills today.



athena.org

ATHENA is an initiative offering financial literacy programs for undergraduate women to prepare them for graduation.

PHASE 3

Collateral

Environmental
Implementations:
Advertisements

CHANGE THE
HAND YOU WERE
DEALT, AND
YOUR FUTURE
IS YOURS.

Investing is not only for CEOs,
or wall street bros.

Become like Athena, the goddess
of wisdom and war, who fought with
rationality and strategy. Explore our
resources to learn personal finance
the easy way, and build your shield
of financial protection as you navigate
life's challenges.



athena.org

ATHENA is an initiative offering financial literacy programs
for undergraduate women to prepare them for graduation.

PHASE 3 Collateral

Environmental
Implementations:
Advertisements



PHASE 3 Collateral

Environmental
Implementations:
Advertisements



PHASE 3

Collateral

Finance Workshops for Students



MAY 06, 24

Cia Rodriguez
ATHENA
514 19th Street NW
Washington, DC, 20052

Dear Ms. Rodriguez,

I am pleased to formally invite you to our upcoming finance workshop, happening **Friday, April 12 from 5-8pm** at **500 17th Street NW, Suite 222**. In our first of three workshops, we'll be going over a basic introduction to handling personal finance. This first event is designed for you to get your feet wet in thinking about what real life financial situations you might encounter, and how you'd handle them.

Attatched is the schedule for our first workshop, titled *Athena's Financial Wisdom: Introduction to Personal Finance for Women*. A presentation will be given explaining the campaign along with helpful financial advice. We'll also play an interactive game, where you'll break into groups and discuss common financial dilemmas based on the scenario card your group is given. Additionally, you'll receive a small notepad to jot down ideas on how to earn some extra cash as we all share our ideas.

You'll also receive a **free gold charmed necklace** as a thank you for coming! The first step on the journey to financial wellness is earning and learning to think with strategy (like Athena,) so you won't want to miss this! It's also a great way to network with other women before graduation.

We hope to see you there, Cia!

Sincerely yours,

Isabel Humphrey
Founder
ATHENA

500 17th Street NW
Suite 222
Washington, DC,
20052

PHASE 3

Collateral

Finance Workshops for Students



Athena's Financial Wisdom: Introduction to Personal Finance for Women

Objective: To support undergraduate women with essential personal finance skills and create a community for sharing financial experiences and advice.

Workshop Outline

Introduction

20 minutes

We'll start with a welcome and icebreaker activity to create a comfortable atmosphere, in which we invite you to meet your fellow Athenas (attendees.) Next we'll have a brief overview of the importance of personal finance for women.

Financial literacy survey to test your knowledge

15 minutes

We will distribute and collect surveys to assess participant's current financial literacy levels. We do this to compare your results when the survey is taken again after the last workshop.

Scenario Cards Interactive Game

One Hour

We'll divide participants into small groups, and hand out a few ATHENA branded cards to each group. Each card will describe a common financial scenario experienced by college girls (e.g., student loans, budgeting for groceries, managing credit cards, etc.) Next, each group will discuss and decide the best course of action for each scenario. This is a chance to connect with peers on common issues and learn new strategies for handling financial challenges that you may not have considered.

Next we'll ask teams to share their answers. Groups that propose solutions backed by strategy, rationality, and a future-oriented

PHASE 3

Collateral

Finance Workshops for Students



Afterwards, we'll reveal the optimal financial decision related to each card on our slideshow and discuss strategies for financial success.

Brainstorm Ways to Earn

20 minutes

Since this is the first ATHENA workshop, we will tackle the first step in the journey to financial wellness: **earning**.

We will hand out ATHENA branded note pads to each attendee. All participants will jot down ideas for earning some extra cash. After five minutes, another open discussion occurs in which ideas are shared out loud. Again, you may hear ideas from others you'll find applicable, and add them to your list. Last, we'll share some more ideas on our slideshow.

This part will be especially beneficial to women who are struggling financially. With this format, the advice is distributed while privacy is maintained.

Group Discussion - Athena's Wisdom Circle

45 minutes

We will facilitate interpersonal discussions where participants share their financial struggles, successes, and advice.

We encourage supportive dialogue and the exchange of practical tips for managing finances. This is also chance to network with other Athenas.

Closing and Reflection

10 minutes

We'll summarize key takeaways from the workshop, encourage participants to continue building their financial literacy, and suggest a couple resources on how to do so.

Your Reward - The ATHENA Shield Necklace

15 minutes

All attendees will receive a free reward: the ATHENA Shield necklace. We will distribute a stylish, gold chain necklace with our ATHENA shield charm as a thank you, and as a symbol of wisdom and protection in your ongoing financial journey.

PHASE 3

Collateral

Finance Workshops for Students



We encourage supportive dialogue and the exchange of practical tips for managing finances. This is also chance to network with other Athenas.

Closing and Reflection

10 minutes

We'll summarize key takeaways from the workshop, encourage participants to continue building their financial literacy, and suggest a couple resources on how to do so.

Your Reward - The ATHENA Shield Necklace

15 minutes

All attendees will receive a free reward: the ATHENA Shield necklace. We will distribute a stylish, gold chain necklace with our ATHENA shield charm as a thank you, and as a symbol of wisdom and protection in your ongoing financial journey.

Soon, you'll learn to battle with wisdom, strategy, logic, and rationality. Learn personal finance the easy way, and build your shield of financial protection as you navigate life's challenges.



PHASE 3

Collateral

Finance Workshops
for Students



PHASE 3

Collateral

Finance Workshops for Students

PART-TIME JOB OR FULL TIME STUDY

You are offered a part-time job that could help cover your living expenses but might impact your study time. How do you balance work and academics, and what are your priorities?



BUDGETING FOR STUDY ABROAD

You have the opportunity to study abroad for a semester. How do you budget for the additional expenses such as travel, accommodation, and daily living costs while still managing your regular financial responsibilities at home?



EMERGENCY FUND

You've received a small inheritance from a distant relative. Do you use it to pay off some of your student loans, start an emergency fund, or put it towards a high-yield savings account? What are the pros and cons of each choice?



ROOMMATE DILEMMA

Your roommate frequently asks to borrow money for groceries and bills but often forgets to pay you back. How do you address this situation without damaging your relationship, and what financial boundaries should you set?



PHASE 3
Collateral

Finance Workshops
for Students

WAYS TO
EARN

Athena's Tip

Fold this up and keep it in your wallet!



PHASE 3 Collateral

Website



Find Financial
Wellness

[Visit our Blog](#)

PHASE 3 Collateral

PSA

