

★★★★★

Crossroads

C

R

E

A

T

I

V

E

Table of Contents

Meet the Team.....4
Executive Summary.....6
Comparative Analysis.....8
Audience Research.....14
Deliverables.....28

WILLIAM ALLEN WHITE
SCHOOL OF JOURNALISM
AND MASS COMMUNICATIONS



Meet the Team

We are Crossroads Creative. Each of us comes from a different road, shaped by our unique backgrounds, skills and experiences. We believe that when those paths meet, great ideas follow. At our intersection, our perspectives merge into something new: fresh ideas, creative direction and meaningful work. Where our roads cross, new possibilities begin.





Laney Turner
Account Executive



Katelyn Caldwell
Research Director



Lindsay Holzmeister
Strategy Director



Jenna Mullen
Creative Director



Ellie Morrow
Media Director



Annie Whalen
Presentation Director

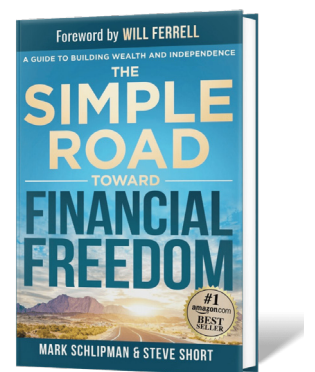
Executive Summary

Client Overview

Mark Schlipman and Steve Short authored the book, *The Simple Road Toward Financial Freedom*. Mark is a financial advisor with over 25 years of experience, while Steve recently retired from a lengthy career in business development. Their friendship grew after a chance meeting during a fraternity Dad's Weekend event at the University of Kansas. A conversation about the lack of financial literacy taught to college students and the experiences their own children encountered with finances post-graduation inspired them to synthesize their skills and produce a book to simplify financial concepts.

The Simple Road Toward Financial Freedom provides simplified financial concepts for recent graduates, college students, and professionals new to the workforce seeking practical steps to take charge of their finances, including budgeting, saving and investing. The book is a #1 Amazon bestseller in finance, having been embraced by organizations and individuals, with a portion of the proceeds supporting the nonprofit Cancer for College.

In addition to the book, Mark and Steve provide complementary Money Guides that serve as companion material for the book. They also produce short, helpful video tutorials that explain topics such as 50/20/30, HSAs, "free money" matches, lifestyle creep, and more. The authors also perform at speaking engagements within companies and education to present their roadmap for building wealth.



Market Analysis

U.S. household debt is high, including student loans, credit cards, and auto loans. Gen Z focuses on saving and building credit, with 47% saving or investing monthly and nearly six in 10 teens prioritizing financial stability. They rely on social media for learning, with 52% using TikTok, especially 59% of women, and young men using YouTube.

The personal finance education market overlaps the \$2.6B U.S. book industry. Digital publishing, social media, and subscriptions are growing, however 56% still purchase physical books. The market favors authentic, relatable, and trustworthy content.

Challenges

One of the greatest challenges faced by *The Simple Road Toward Financial Freedom* is the intense competition in the market, as it is heavily saturated with financial services and established voices. In this industry with many competitors, it is hard to differentiate and capture the attention of Gen Z individuals seeking financial guidance.

Another significant hurdle is the shift in how Gen Z consumes information. This audience tends to avoid physical books and instead favors quick, simple, and accessible digital forms such as AI-driven tools. To effectively reach and engage this audience, it is essential to leverage social media content and other online platforms to connect with readers and align with their habits.

Target Audience

Primary

Young adults aged 18–44, including Millennials and Gen Z, early in their careers or recent graduates. They seek simple, practical steps to manage debt, save, and build wealth. Many have beginner-level financial knowledge, with women often focusing on independence and men on investments. Annual incomes range from \$33,000–\$74,000, and most work full-time. Targeting this group is important because they are actively forming financial habits and are looking for trustworthy, actionable guidance to achieve independence.

Secondary

Digitally-savvy consumers interested in personal finance content. They value practical guidance through social media, online courses, and books. This group is price-conscious, minimalist, and motivated by financial independence, wealth-building, and debt management. Targeting them is important because they discover content online and can influence peers, expanding the book's reach beyond direct readers.

Competitors

- *The Broke Millennial*, written by Erin Lowry, offers a four-part book series that is branded around the motto "Get Your Financial Life Together (#GYFLT).
- *I Will Teach You to be Rich* by Ramit Sethi puts an emphasis on the roadmap to early financial independence. Ramit has branded beyond the book and has created his own personal financing coaching classes, a Netflix show, as well as a podcast.
- *Atomic Habits*, written by James Clear, is an indirect competitor but offers similar tactics of long-term growth and motivation. He has also created a brand identity out of his name and has expanded into an app, weekly newsletter, and masterclasses.
- *The Financial Diet* is another indirect competitor worth noting because of its best practices. It can be described as a digital media personal finance brand that emphasizes community and resources through social media tactics.

Why Act Now?

It is necessary for the Simple Road Toward Financial Freedom to take action now because the financial service industry is continuously evolving, while demanding marketing skills to change rapidly.

Gen Z is now entering the work force and managing their money more independently, but many are turning to quick digital resources such as AI services, TikTok content, and simple YouTube videos. Taking action at this time will allow us to position the book as a credible, reliable, and relevant resource for Gen Z, building long-term brand awareness.

Comparative Analysis

KU

STAUFFER- FLINT HALL

1435 Jayhawk Blvd.

School of Journalism
& Mass Communications

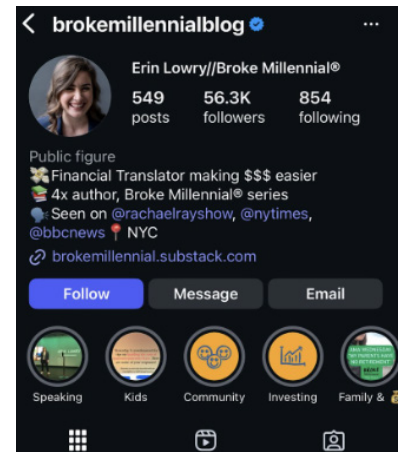


Competition Analysis

Broke Millennial: by Erin Lowry

The Broke Millennial series is known for its relatable tone including step-by-step guides for millennial's. There are four parts to this series; Take Control and Get Your Financial Life Together, Stop Scraping By and Get Your Financial Life Together, Broke Millennial Takes on Investing, and Broke Millennial Talks Money. Lowry describes herself as a freelance writer who takes pride in her avoidance of preaching and overly critical methods.

Broke Millennial is branded around the motto "Get Your Financial Life Together (#GYFLT). Her online presence is casual and conversational with a touch of humor and storytelling. Other forms of engagement are shown through her blogs, courses, coaching and speaking opportunities. Email newsletters are also highly promoted throughout the website and social media. With millennial's being the target audience, Lowry uses her book and life experience as a personal connection with addressing their financial concerns.



Social Audit

Content & Tone:

Lowry isn't afraid of sharing personal life updates on her social media and this plays into the comfortability and approachability achieved through writing her book.

- Posts include tips/tricks
- Short clips with partnerships/collaborations
- Promotions of her podcast appearances
- Personal stories about her financial journey

Branding:

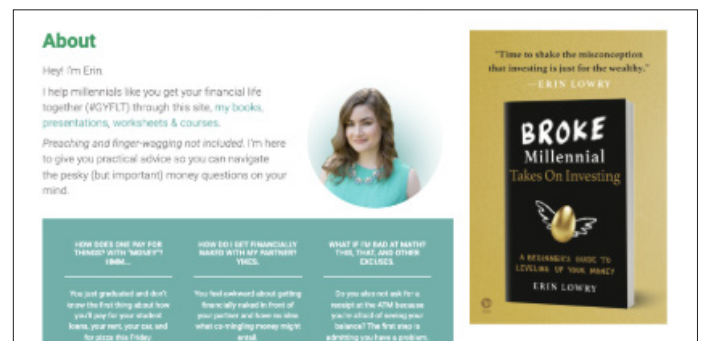
- Core colors: Teal, Green, Black, White, Yellow
- Website is text-heavy but includes visual hierarchy.

Instagram (56.3K), Facebook (6.4K), Twitter (27.1K)

Broke Millennial has a large following on Instagram where the posting schedule is sporadic. Recently, Lowry has had what she calls a "professional identity crisis" as she opened up on social media about her journey shifting as she has progressed professionally explaining her gap in media presence. This new re-branding has pivoted her to a new series of "unsolicited advice" where she uses Substack.com to receive engagement from readers, post blogs, and give "big sister energy."

Website:

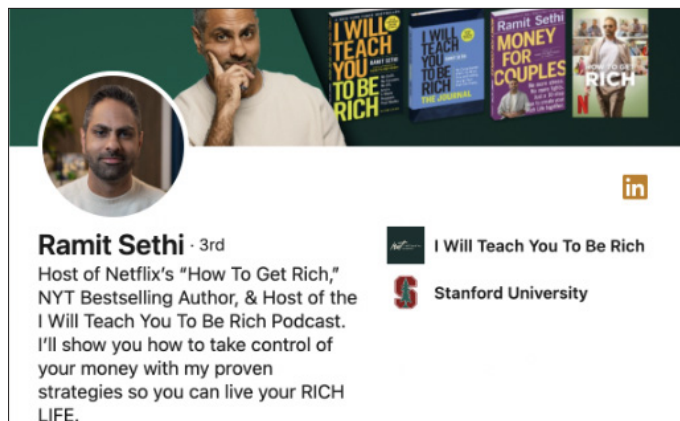
- Blog posts updated with pressing financial questions, including "Should I invest while paying off debt?"
- Includes a free #GYFLT worksheet when you become an email subscriber that includes a 55-step plan to help individuals feel more in control of their finances.
- Author coaching, courses, and speaking engagements ("Hire Me" offerings)



I Will Teach You to Be Rich: by Ramit Sethi

This book is known for its humor and hybrid platform. Ramit Sethi has created his own brand out of his name through his structured programs like “Earnable,” which comes from a coach-able standpoint for those interested in personal finance and business.

It is positioned as practical and simple with bonus planning tools, emphasizing that it’s a complete roadmap for early financial independence.



Social Audit

Overview:

- The website is very structured yet personalized.
- Blogs, podcasts, reviews, calculators, events.
- “About Me” on page is easy to read, yet provides transparency and trust. It is also very personalized with financial milestones.
- Social posts daily with video being most popular.
- Testimonials prove success following his programs and book.

Instagram (916K) Twitter (296K) LinkedIn (135K)

The social media presence is consistent, engaging, and aligned with his brand voice. Frequent posting, clear step-by-step advice, and storytelling help give the overall tone of trust and motivation.

Although Ramit has a variety of financial help outlets, his use of social media doesn’t consolidate to one focus. The website is very dynamic and features a variety of mixed multimedia – great for SEO and conversions. Reviews are featured on the homepage as well which helps establish credibility.

RAMIT SETHI'S EARLY LEARNINGS

- In 2004, studied tech & psychology at Stanford.
- Self-funded undergrad & grad school with a system to win 60+ scholarships.
- Invested first check in stocks—lost half immediately.
- Wake-up call to truly understand money.
- Most money advice is outdated & irrelevant.
- Financial success isn't about restriction—it's about mindset.
- Master the psychology of money, and everything else follows.

It all started in a dorm...and ended up on Netflix



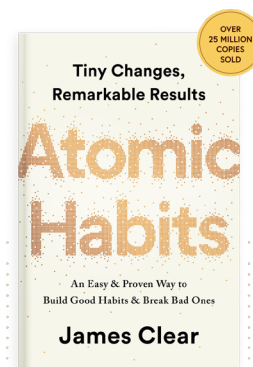
Best Practices

This section includes authors and books in adjacent niches to see what others are doing in terms of best practice.

Atomic Habits: by James Clear

Atomic Habits is similar to The Simple Road book in terms of target audience and mindsets that create long-term growth. The book emphasizes the power of small, consistent actions which creates a motivational tone similar in terms of writing style. Conversely, Atomic Habits has branded itself beyond the sale of the book itself.

Clear has created an app that correlates with the book (Atoms) based on habit tracking as well as a journal. Beyond this, a newsletter reaches over 3 million subscribers weekly. It includes three short ideas from the author, two quotes from others and one question for the reader to “ponder.” It’s free and all issues are available to view on the website. He also delivers keynotes through BigSpeak and teaches a MasterClass course with 10 video lessons.



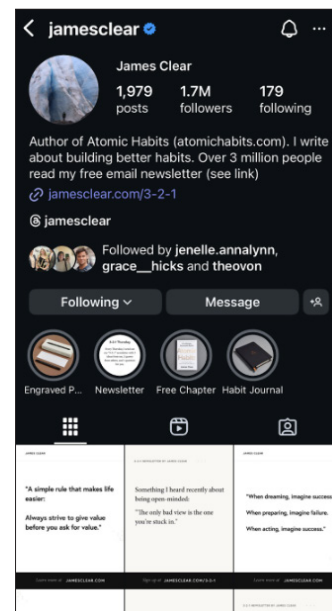
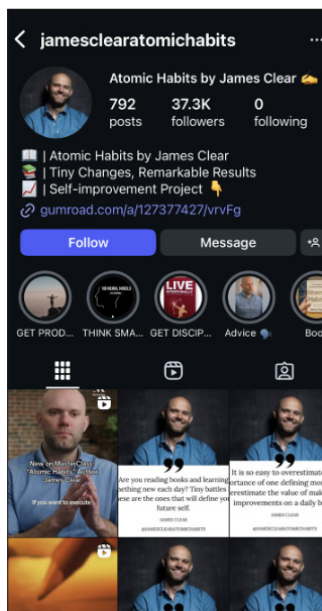
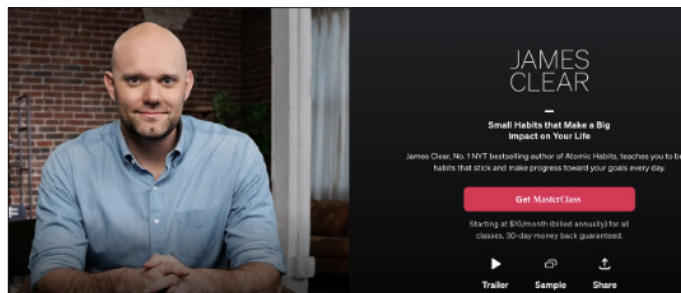
Brand Overview:

The book itself has 37K followers on Instagram, and posts are daily. Most of the content is similar and recycled images with quotes from the book. Captions vary in length, but the same 20 hashtags remain at the bottom of every post. Some are not relevant to the book, but instead the target audience. Once a week, reels are posted with videos (less than a minute) from the author giving advice. Each video features dynamic text that is consistent across social media branding.

The author (James Clear) has created a brand out of his name by posting Atomic Habit quotes on his Instagram and receives high engagement. (1.7 million followers). Posts are daily and receive an average of 5K likes. Most quotes come from the book or the 3-2-1 Newsletter. All captions have a Call To Action suggesting feedback and engagement on repost on stories.

Atomic Habits’ social media presence doesn’t extend beyond Instagram, however the book itself is popular on platforms like TikTok where users share their takeaways from the book.

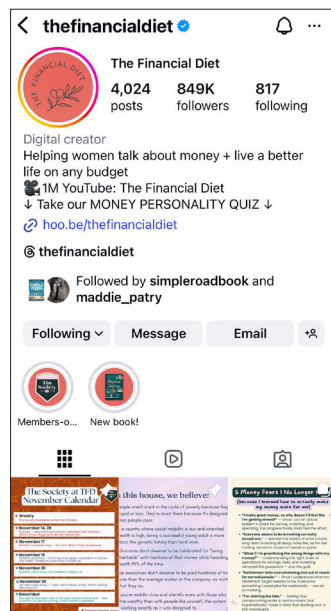
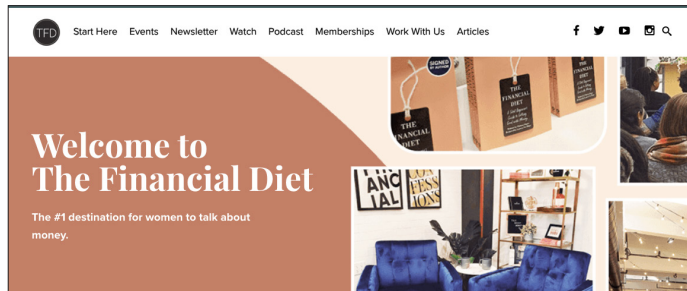
James created a MasterClass containing 10 lessons across 1 hr 29 mins. Each lesson is a new habit that can further lead users towards their goals. To access the MasterClass it is \$10/Month.



The Financial Diet – digital personal finance brand

The Financial Diet is designed with a key target audience (women) in mind. Their use of relatable storytelling and weekly newsletters create actionable guidance. Although they aren't selling a book, they provide tactics worth noting such as downloadable resources like checklists and goal-setting worksheets, and opportunities for readers to pitch their own articles—creating a strong sense of community and inclusivity.

The Simple Road has a very similar target audience to the Financial Diet. Both prefer trendy and relatable content that helps them overcome their intimidation around finance. They have done a great job at establishing a community around their brand and encouraging personal stories.



Brand Overview:

With 824K Instagram followers, The Financial Diet maintains a polished yet conversational tone, frequently posting short, trend-driven videos and using interactive Stories to answer audience questions. They host free masterclasses, partnerships with financial apps like Fizz, and events hosted via Eventbrite.

By re-purposing content across platforms—Facebook, X, YouTube, and Instagram—they maximize reach while maintaining consistent branding. Their strategic outsourcing of content, partnerships, and SEO-driven articles position them as a credible and sustainable voice in personal finance media, offering an approachable, lifestyle-oriented path to financial confidence.

- Weekly Newsletters
- Avoids overly salesy finance-guru tone.
- Not afraid to share their mistakes.
- Encourages audience to engage through questions in the comments, tags, and shares.
- Repurpose Content across channels.



Audience Research

STAUFFER-FLINT HALL

Target Audience

Audience Overview

The target audience for the "Simple Road to Financial Freedom" is Generation Z young adults, specifically, those who are about to enter the workforce, or who are soon to be or recent college graduates. According to a recent Mintel report, 79% of Gen Z are adults between the ages of 18-28, signaling a transitional period of time where many members are starting to experience the stages of adulthood. A potential 2 million Gen Z members are entering the workforce each year, with a typical salary of \$38,325. Additionally, "45% of young adults say they are completely financially independent from their parents", according to a study conducted by Pew Research.

As Gen Z begins to transition into the workforce and adulthood, finances are becoming increasingly more relevant in their daily lives; almost 6 in 10 Gen Z teens see financial stability as a primary goal of adulthood. Gen Z understands the importance of financial security and values the traditional financial goals, such as saving and building credit, while also preventing debt whenever possible. Setting Gen Z apart from other generations is their knowledge of the importance of saving. 47% of Gen Z usually save or invest extra money at the end of the month, a higher savings rate than Millennials or Gen X.

When it comes to consuming information from financial brands, Gen Z wants to feel connected and as if they are building a genuine relationship. Gen Z prefers brands that use relatable, humorous content, indicating that financial content must be delivered in an approachable way. Gen Z prioritizes reputation and security when looking for information from financial brands. They want to know that the source is credible and trustworthy.

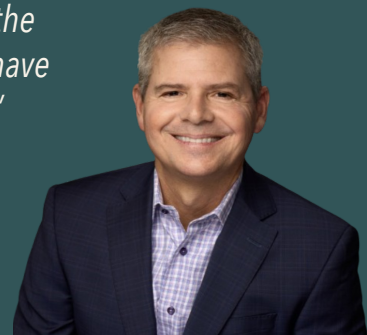
Social media has become a major channel for Gen Z to learn about financial topics. 52% of Gen Z use TikTok for financial education, with 59% of Gen Z women turning to TikTok, while young men rely more on YouTube. Social media has also become influential in book purchasing as well, with 43% of consumers citing online platforms like TikTok and Facebook as drivers of book discovery, on par with recommendations from friends and family.

Additionally, "#BookTok", a community on TikTok where creators share short videos and reviews about books they are reading, has created viral success for new authors, making TikTok a particularly relevant channel for reaching Gen Z with financial self-help titles. When researching financial information, Gen Z is more likely than any other generation to use TikTok and YouTube as search engines, highlighting a particular trust in the platforms.

Key Takeaways:

- Steve and Mark envision the book as a practical tool for young people and their parents.
- The brand is built on a passion for helping individuals become confident in their individual financial journeys.
- They want readers to walk away with a concrete knowledge of the 50/20/30 model.
- The brand should feel like a mentor and a friend.
- Brand image should be actionable, simple and empowering.
- Overall goal is to increase brand awareness, therefore, increasing following.

"If we can just get anybody to follow what we've done in the book, and start saving and setting themselves up for the future... that's really the passion we have behind this."



Primary Research

To gain a deeper understanding of the brand and its creators, we conducted an interview with Steve to explore the brand's identity and purpose. The idea for the book was born out of a recognition of the lack of education regarding financial topics in young people today. Both Steve and Mark have a passion for helping individuals become more comfortable on their financial journeys.

Steve's own interest began early, setting aside money in high school and college when he could, leading him to have a passion for the topic. He envisions the book as a practical tool parents and young adults can use together to learn about financial information in a simple, step-by-step manner. One of Steve's primary goals is for readers to walk away with concrete knowledge of the 50/20/30 model, a guide to budgeting, saving and spending your money.

When describing the brand identity, Steve emphasizes that the identity should feel like a mentor or a friend. He summarizes the brand image in three words as actionable, simple and empowering. Regarding social media, Steve's goal is to increase followers in order to help establish brand awareness.

32% of respondents prefer learning about finance through quick tips or short video posts on social media, highlighting the need for an active and engaging social media presence.

Qualtrics Survey

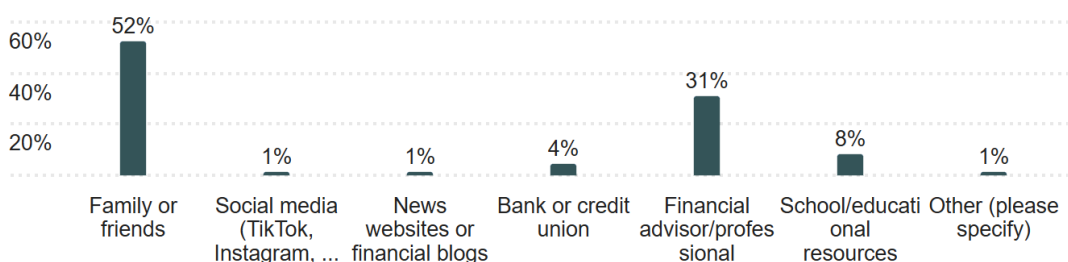
We conducted a survey to gather information on financial literacy and money management among young adults, specifically individuals new to the workforce and recent or upcoming college graduates. Through the study's results, we can gain a better understanding of the financial habits and money management techniques among the target audience to identify potential strategies and tactics.

Our survey, which was distributed through our own network of friends and social media, consisted of 27 questions and generated 101 responses. Survey responses were pulled on Oct. 2, 2025. Demographically, 16% of respondents were male and 83% were female, with 1% being non-binary. The average age range of respondents was between ages 21 and 23.

The survey provided many insights regarding financial knowledge and habits among young adults. When it comes to consuming financial information through various channels, a majority of respondents preferred learning about finance in short-form content rather than through podcasts or Q&A forums.

The survey results also communicated a significant need among young adults for trust and credibility when looking for financial information. If there is a lack of trust between the consumer and the brand, the consumer is not going to be engaged or interested in the product. The survey results find that most people trust family and friends the most for financial advice, rather than social media and news outlets.

Q43 - Which of these sources do you trust the most for financial information? - Selected Choice



Target Audience

Research Continued

While Gen Z shows a significant interest in personal finance compared to other generations as young adults, there is still a gap when it comes to reading financial material. A majority of respondents have never read a financial book, highlighting the need for more marketing toward the younger generation.

Gen Z may not be actively reading financial material, but they are willing to if they trust the brand and are aware of the benefits. Almost one third of respondents said they were somewhat likely to purchase a finance book if it discussed how to save, invest and overall manage money.

Additionally, the average price respondents were willing to pay for a financial resource was around \$37.00. These findings indicate Gen Z's willingness to purchase financial books/materials; they just need to be resonated with in an approachable and clear way.

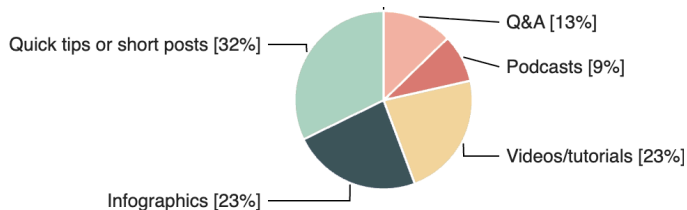
52% of respondents trust their friends and family for financial information the most. This shows that the audience needs to develop a relationship with the brand in order to establish trust.

When Gen Z does turn to social media for financial advice, they are most often turning to video platforms like YouTube and TikTok. 45.16 percent of respondents find YouTube to be the most credible social media platform for financial information. TikTok was second with 17.74%. This highlights a need to be consistent in posting on both platforms.

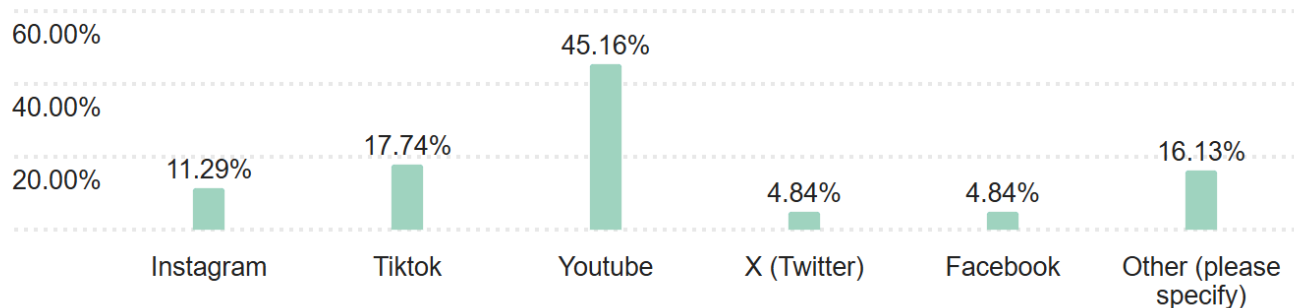
92% of respondents do not follow any financial influencers, highlighting a gap between consuming financial content and taking the action of following the account.

While Gen Z often encounters financial information online and through social media platforms, they are unlikely to be following financial accounts and influencers. This demonstrates a need for stronger engagement between the brand and consumer to bridge the gap between viewing and becoming an engaged follower.

Q18 - How do you prefer learning about finances online? Select all that apply. - Selected Choice



Q25 - Which social media platform do you consider the most credible source for financial advice? - Selected Choice



Audience Interviews

Along with conducting the survey, we also interviewed seven members of the target audience to learn more about their financial knowledge and areas where they are less confident.

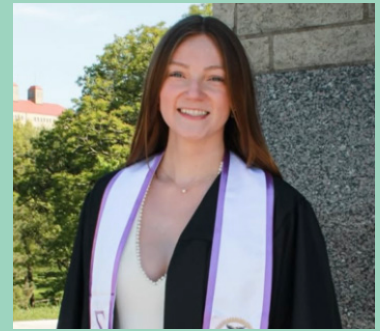


Jessica Whalen is a 24-year-old female currently in her second year at Villanova Law School. Whalen feels confident managing her finances due to advice from family, friends and professors. She also feels that the internet is a great tool to quickly answer any financial questions she has.

Whalen finds that her education has somewhat prepared her for the world of finances; however, her biggest financial uncertainty today is learning how to properly invest in retirement funds. When Whalen turns to find financial information, she prefers to attend financial seminars hosted by her law school, finding that these seminars offer valuable information for someone of her age group and for people with similar career goals. When Whalen tracks her finances, she uses solely her banking app.

Whitney Branner is a 23-year-old female living in KCMO. She graduated from the University of Kansas with a Business Administration degree last semester and now works full-time as an Account Administrator. She states she felt prepared fairly well through the Kansas Business School, but still is dependent on her parents for certain expenses. Her biggest concern for finances is long-term savings while learning how to also “spend” her money in post-grad.

When asked what makes her trust a financial account on social media, Branner noted that having a large and engaged following makes her more likely to listen to what is being said. She feels that accounts with large followings mean they are more likely to be trustworthy and credible. Branner also appreciates when financial brands target her exact age group and give relevant advice, such as what to spend your money on and what to maybe save instead.



Ele Chier is a 22-year-old female living in Lawrence, Kansas. She is actively pursuing a degree in Pharmacy through the University of Kansas. Chier works part-time as a pharmacy intern at Dillons and feels she is not prepared to make big financial decisions. Her main pain point is budgeting, as it makes her feel overwhelmed. Distraction is the main challenge for Chier when she is learning about finances.

The use of analogies helps her remain attentive, as well as short-form videos. Chier feels the unpreparedness regarding managing her finances, noting that she is expecting to have a difficult time saving her money instead of spending it on her wants once she has a full-time career. Chier likes the idea of an influencer giving her important financial information, noting, “If it was an actor/musician/influencer/athlete that I like... then I would be more likely to listen or stop my scrolling.”

Target Audience



Alexa Gomez is a 21-year-old senior journalism student at the University of Kansas from Overland Park, Kansas. She's pursuing a career in digital marketing and advertising while paying for her own college education and balancing work on the weekends. Gomez is currently learning how to manage her money, save for the future, and prepare for expenses such as student loans, rent and bills. Gomez primarily turns to family and friends or social media for financial advice as she finds many financial books hard to start, irrelevant, or hard to put into practice.

Gomez is expecting her biggest financial adjustment post-grad to be starting to pay off her student loans. She noted that she now feels the struggle of living paycheck to paycheck and is unsure how to break out of the system. Topics that Gomez wants to learn more about are the basics of investing and taxes, and she would prefer to receive this information in simple, big-picture terms. When consuming financial information, she prefers a balance of real-life stories and straightforward information in order to maintain her attention yet educate her.

Mia Godinez is a 21-year-old female living in Lawrence, Kansas. Godinez is a senior at the University of Kansas studying Digital Marketing. She works part-time as a social media manager for a health clinic and also as a retail associate at Urban Outfitters. Godinez feels moderately confident in her abilities to manage her finances; however, she still faces uncertainty and challenges.

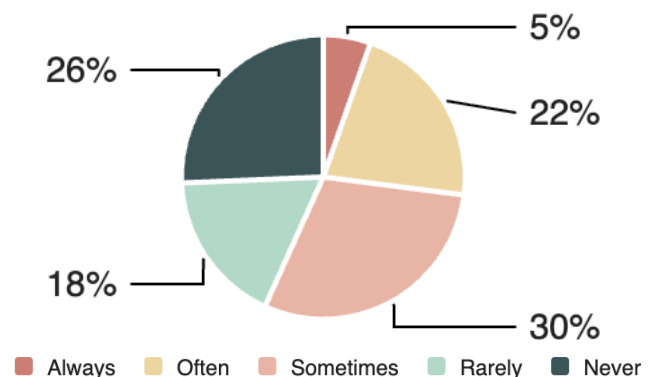
When it comes to tracking her spending and savings, Godinez feels fairly confident in maintaining balance. Her biggest financial struggle is the idea of unpredictability. Some weeks, Godinez has to spend money she wasn't expecting to spend, which can make budgeting increasingly more difficult. Godinez reflected on her earlier financial education and noted that something she wished she had known at an earlier age was the benefits of saving early and of building credit.



Key Takeaways:

- Young adults often feel unprepared to save money and don't know how to begin budgeting or overall long-term planning.
- Family, friends and the internet are often places the target audience turns to for advice, as financial books can become quickly overcomplicated.
- There is a strong interest in learning financial material through short-form content rather than long-form content.
- There is an overall interest among young adults to learn more about finances and become better prepared to build wealth.

How often did you budget when you first paid bills?





Megan Geyer is a 23-year-old female living in Lenexa, Kansas. She graduated from OSU with a degree in Human Development and Family Science/Pre-Nursing. Since graduating, she has been working at Hotworx, a local fitness studio, and is preparing to begin nursing school in the spring. Geyer manages her money primarily through mental tracking, though she hopes to use spreadsheets in the future. Her biggest financial challenge has been managing car-related expenses, which led her to start an emergency savings fund.

She feels most concerned about navigating student loans and future insurance costs, while also aiming to gain confident in budgeting and long-term planning. Geyer has never read a financial book; however, she would find one to be credible if the author's financial background could be fact-checked on LinkedIn. Geyer prefers financial topics taught through anecdotal stories. "For example, a time they messed up with a credit card and how they fixed it, their house payment, taxes. It makes me less overwhelmed to know that I am not alone in my financial concerns."

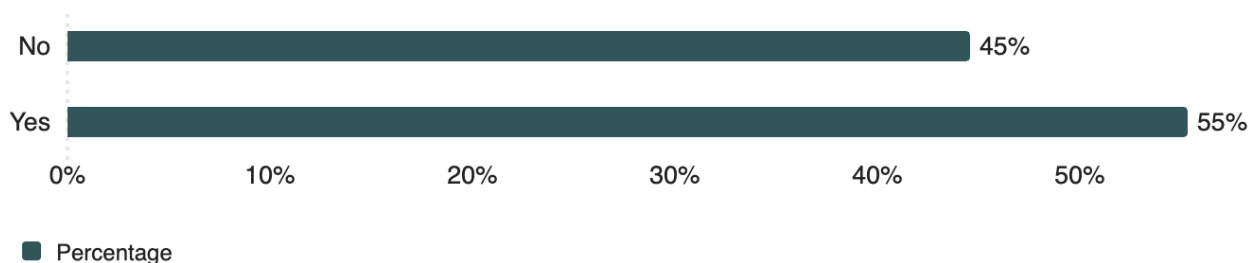
Hope Joyce is a 21-year-old senior attending the University of Kansas, where she majors in digital marketing communications. She is from Milwaukee, Wisconsin, and is currently balancing a healthy work-life balance while also managing her own finances. Joyce's concerns regarding finance lie in balancing creating a savings fund while also being able to spend money on her wants.

Joyce is currently not using any tools to track her spending habits, but is open to learning about financial tools that can assist her in learning how to save. Joyce tries to implement budgeting in life by tracking how much money she spends each month on her food costs. Joyce tries to only spend a certain amount on the weekends in order not to dip into her savings account. Her financial habits have improved since becoming financially independent, noting that not having a safety net has allowed her to become more responsible.



Q15 - Do you track your expenses regularly?

74 Responses



Personas



Sarah Miller

Sarah Miller is a 24-year-old marketing coordinator in Kansas City who loves coffee shops, travel, and concerts with friends. She follows lifestyle and finance creators on TikTok and Instagram for simple, visual money tips that feel realistic. She values authenticity and clear, step-by-step guidance, but sometimes feels intimidated by complicated advice or influenced by comparison online. With student loans, rent, and future goals on her mind, she wants practical ways to enjoy her 20s while building financial security.

Interests



Demographics

Age: 24

Location: Lives with a roommate in apartment in KCMO

Education: Bachelor's degree in Communications

Career: Entry-level Marketing Coordinator at a mid-sized company

Income: \$40,000 - \$48,000

Debt: \$30,000+ student loans and \$2,000 in credit card debt

Financial Behavior: Uses Venmo and Apple Pay frequently

Media Habits

Technology Use: Active on TikTok, Instagram, and Pinterest

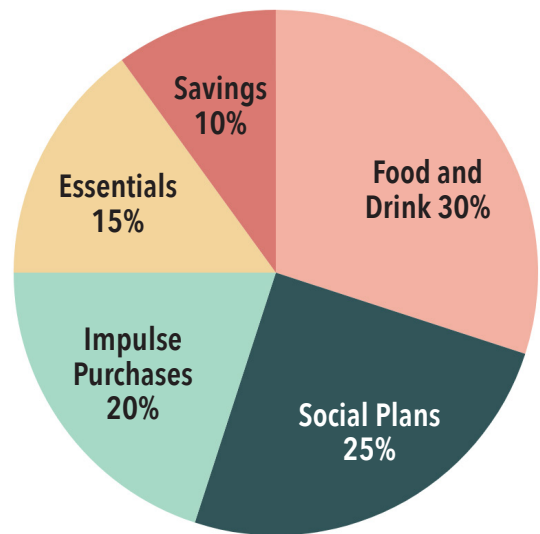


Frustrations

Sarah feels torn between bills and having a social life. She struggles to stick to budgeting apps, often impulse-spends, and wants to invest but doesn't know where to start or who to trust. She wants to enjoy her 20s without guilt, yet financial language feels confusing and tracking expenses makes her anxious.

Spending Habits

Mostly spends on food, social plans, and small treat purchases. Uses Venmo to split costs with friends and occasionally tries budgeting apps but rarely stays consistent. Often impulse-spends and feels unsure how to start investing or saving long-term.



How We Can Help

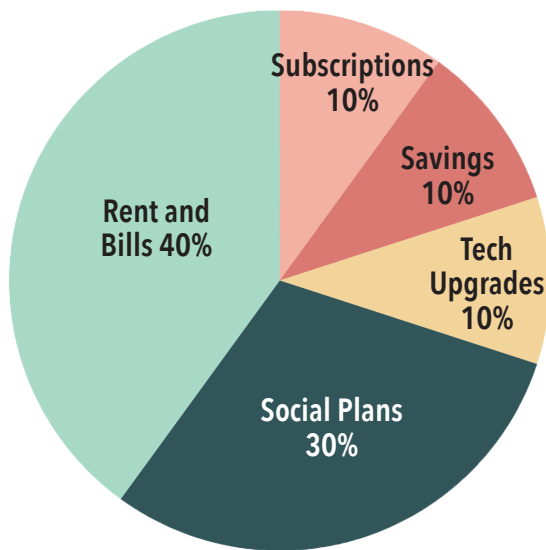
The Simple Road book can help Sarah by breaking down money management into clear, practical steps that feel approachable instead of overwhelming. It offers relatable stories and realistic habits she can apply while still enjoying her life.

Through its guidance on saving, budgeting, debt payoff, and long-term planning, the book gives her a trusted, simple starting point, helping her feel more confident, less anxious, and more in control of her financial future.



Jordan Smith

Jordan Smith is a 23-year-old sales rep who recently graduated with a business degree and started his first full-time job at a tech company. He's focused on building his career while trying to manage real-world expenses like rent, student loans and social life. Jordan listens to money podcasts and follows finance creators, but most advice feels too complicated to understand. He wants simple, realistic guidance to make smart financial moves without sacrificing the things he enjoys.



How We Can Help

The Simple Road book can help Jordan by breaking down money basics into clear, practical steps he can actually follow. It simplifies budgeting, saving, loan repayment, and early investing so it feels doable.

With relatable examples from people his age, the book helps him build confidence and develop realistic habits while still enjoying his social life and settling into his career.

Interests



Demographics

Age: 23

Location: Lives in a one-bedroom apartment in Dallas, TX

Education: Bachelor's degree in Business

Career: Sales Representative at a tech company

Income: \$55,000

Debt: \$35,000 in student loans and a \$10,000 car loan

Financial Behavior: Uses credit cards but sometimes carries a balance, tracks spending in Mint, pays bills online

Media Habits

Technology Use: Listens to Apple Podcasts, follows finance creators on YouTube, Reddit and X. Active on TikTok and Instagram.



mint



Listen on
Apple Podcasts



YouTube

Frustrations

Jordan feels torn between paying off loans and wanting to save or invest. He tries budgeting but rarely sticks with it and often overspends on social plans or new tech. Conflicting financial advice leaves him unsure who to trust, and topics like investing, credit, and taxes feel intimidating. He's learning to manage a steady paycheck while trying not to miss out on his social life, and he often feels like he should "know more" about money than he does.

SWOT & Scorecard

Summary

This campaign seeks to maximize the strengths of a passionate, relatable brand while addressing challenges in digital presence, audience alignment, and market competition.

This campaign aims to leverage the brand's expertise, relatability, and strong personal investment (**strengths**) while improving digital presence and brand cohesion (**weaknesses**), capitalize on Gen Z's digital engagement and renewed interest in physical books (**opportunities**), and address market competition, AI alternatives, and perceptions of self-sufficiency (**threats**).

Strengths

- Personal inspiration; relatable through their children
- Strong financial expertise
- Highly invested, mission-driven team
- Nonprofit affiliation adds credibility
- Will Ferrell connection resonates with Gen Z
- Simple, short, and accessible book

Weaknesses






- Growing Gen Z demand for financial guidance
- Existing Adulting 101 resources support the book
- Digitally savvy audience that's easy to reach
- Rising interest in collecting physical books

Opportunities

- Book-focused brand limits long-term growth
- Inconsistent, non-cohesive brand identity
- Website lacks personality and clear voice
- Small two-person team limits digital capacity
- Social media voice doesn't match the audience
- Book may be too simple for readers with complex debt

Threats

- Gen Z increasingly prefers digital over physical books
- AI tools replacing traditional financial resources
- Heavy competition in the finance space
- Young adults believe they can manage money alone
- Crowded social media landscape makes messaging easy to overlook

PLATFORM/STATS	CONTENT & TONE	BRANDING
<p>Instagram: @simpleroadbook</p> <p>57 posts 104 followers 30 following</p>  <p>~ Once a week</p>	<ul style="list-style-type: none"> Mix of static images and Reels. Earlier stages of the account focused on static images. There was a recent implementation of Reels (around 1 minute). Content is niche and Reels contain a "hook" grabbing the attention of the viewer within the first few seconds. Video audio is crisp, clean and professional. Captions vary in length. Almost all contain a clear CTA. 	<ul style="list-style-type: none"> Consistent hashtag use Colors (blue) and fonts used vary across posts. Inconsistent thumbnails for videos Book is used as logo
<p>Facebook: @SimpleRoadBook</p> <p>396 followers 18 following</p>  <p>Once a week posting schedule</p>	<ul style="list-style-type: none"> Tone is informative and formal. The audience is given direction and encouragement with an educational theme. Content on Facebook is the same as Instagram. There are clear calls to actions with accessible links unlike Instagram (due to the caption format of the platform). 	<ul style="list-style-type: none"> The cover photos and videos are the same, but Facebook tends to contain longer captions. Book is used as logo Banner doesn't include the primary headline font.
<p>Youtube: @TheSimpleRoadBook</p> <p>228 Subscribers 28 videos 9,356 views</p>  <p>Inconsistency with promised posting schedule in "about" on Youtube page.</p>	<ul style="list-style-type: none"> Five curated playlists featuring "episodes" of short 1-3 minute posts. With the exception of a 7 minute long video. The audience feels more broad than other platforms. The tone of the page is instructional mentor. Several of the thumbnails hint at their professional experience by stating "Best-Selling authors explain." 	<ul style="list-style-type: none"> The book cover is used as the cover photo on videos (legibility issues) Colors and fonts don't align with book (purple, black, yellow, navy) Different decorative font compared to prior posts.
<p>LinkedIn: The Simple Road Toward Financial Freedom #GenZMoneyMentors</p> <p>613 followers</p> <p>Recycled content</p> 	<ul style="list-style-type: none"> Captions for posts on LinkedIn are longer, contain external working links, and consistent tagging. The content and overall tone of the LinkedIn page is more broad and designed for institutional audiences. It is professional and differs from other platforms like Instagram which uses more casual advice. Older posts contain advice, commentary on financial articles, or spotlights from collaborations. This differs from every other platform they post on. 	<ul style="list-style-type: none"> Same content and branding from Instagram and Facebook Book used as logo
<p>TikTok: @simple_road_book</p> <p>105 followers, 17 following</p> <p>~ once a week</p> 	<ul style="list-style-type: none"> The book is available for purchase on TikTok Shop and is linked in every post. The overall tone is similar to Instagram and Facebook as the teacher and motivator. All videos are roughly 40seconds to 1 minute long. The content remains financial but digestible at the same time. They interact with occasional comments by liking them. 	<ul style="list-style-type: none"> The visuals often include on-screen text overlays summarizing key points, and sometimes direct - creating that dynamic and quick paced Tiktok style.

Current Socials

💡 New videos every other week – subscribe for financial tips you’ll actually enjoy.

SIMPLEROADBOOK.COM

Personal Finance Book for Young Adults, Recent Graduates & 20-Somethings | The Simple Road

Learn more



#GenZMoneyMentors #FinancialFreedom
 #PersonalFinance #MoneyTips
 #BudgetingMadeEasy #WealthBuilding
 #FinancialLiteracy #MoneyMindset
 #FinancialGoals #MoneyHacks



Social Audit Takeaways

Our SWOT and social scorecard highlight some potential opportunities for growth: a more unified branding (colors, fonts, logos), consistent posting, and content tailored to Gen Z.

These insights lead us to take a creative direction that introduces a refreshed social campaign. As we learned in the target audience research, Gen Z prefers content that is relatable, transparent and approachable. Creating a consistent branding guide and voicebook will help meet the audiences preferences.

Search by company or advertiser name

Search by keyword


Count

2 ads match your search criteria

The Simple Road Toward Financial Freedom | #GenZMoneyMentors
Promoted

Today's Simple Road Chat Topic: Job Changes And The Impact On Your Retirement Funds

If you share our mission to educate...




View details

The Simple Road Toward Financial Freedom | #GenZMoneyMentors
Promoted

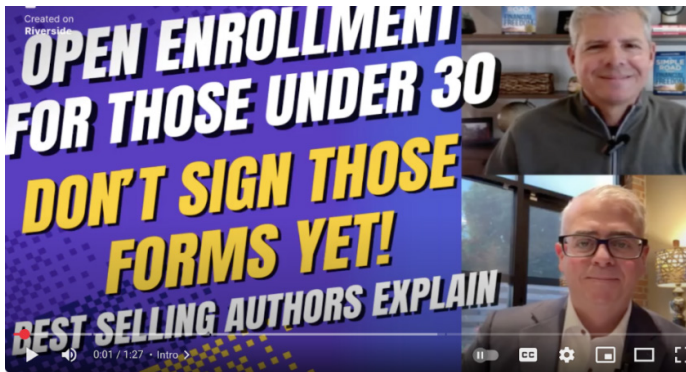
The habits you build in your 20s will make you rich — or keep you broke.

That's why we created The Simple Road Toward F...



Created on Riverside

OPEN ENROLLMENT FOR THOSE UNDER 30
DON'T SIGN THOSE FORMS YET!
BEST SELLING AUTHORS EXPLAIN



Under 30? Open Enrollment Guide: HSA, 401(k) Match, Life Insurance, Benefits

The Simple Road Toward Financial Fr...
228 subscribers

Subscribe

3 likes

Share

Download

2.9K views 10 months ago #GenZ #401k #LifeInsurance

Simple Road...

Foreword by WILL FERRELL

A GUIDE TO BUILDING WEALTH AND INDEPENDENCE

THE **SIMPLE ROAD** TOWARD **FINANCIAL FREEDOM**

#1 amazon.com BEST SELLER

Find similar

MARK SCHLIPMAN & STEVE SHORT

\$28.99

Free shipping on orders over \$30.00 >

The Simple Road Toward Financial Freedom: B...
Wealth & Achieve Independence.

Add to cart

Buy now




The Simple Road Toward Financial Freedom

Your Guide to Wealth and Independence

Foreword by Will Ferrell | Supporting Young Cancer Survivors




The Simple Road Toward Financial Freedom

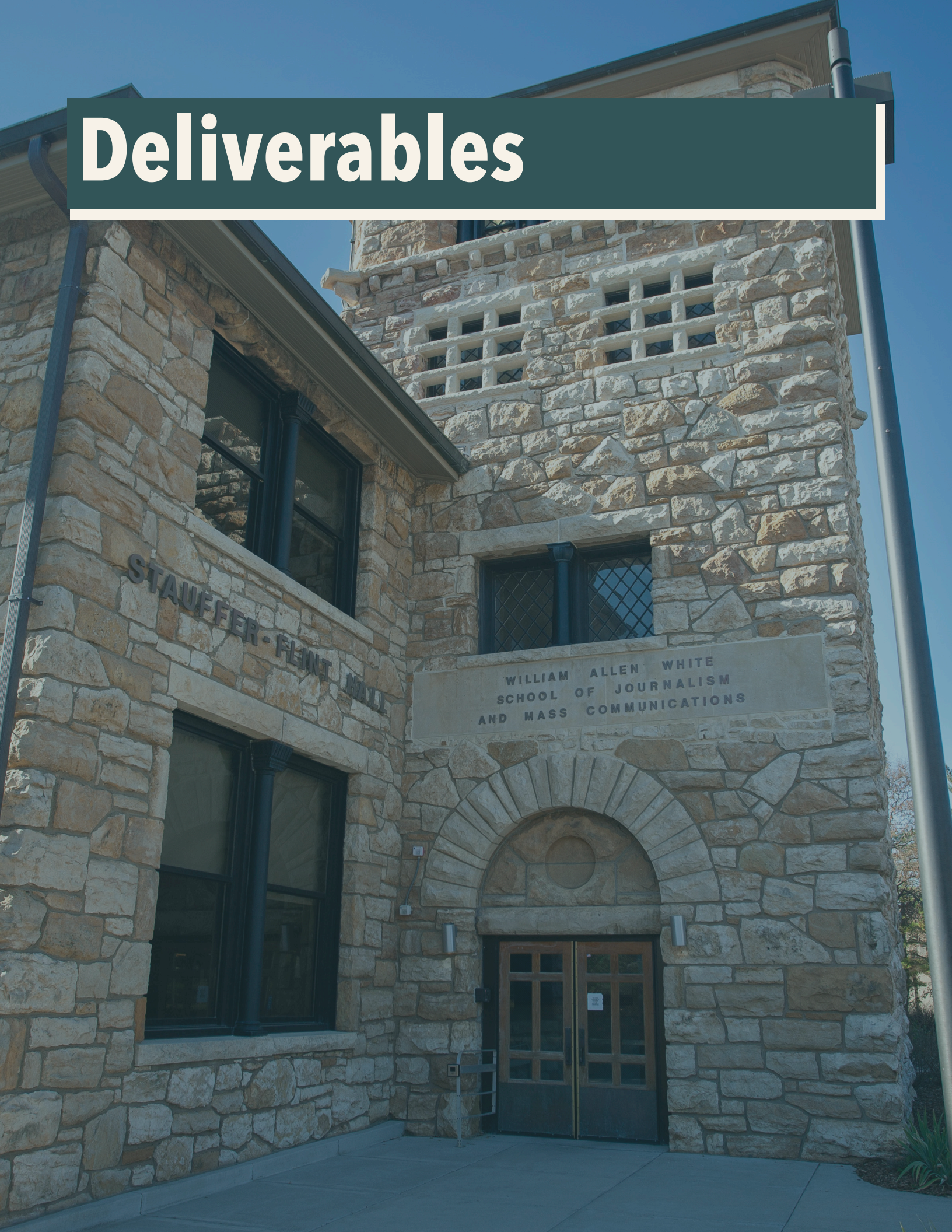
@SimpleRoadBook · 252 subscribers · 32 videos

Personal finance for Gen Z & young professionals — from the Amazon #1 Best Seller | ...more

simpleroadbook.com/links

Subscribe

Deliverables



STAUFFER-FLINT HALL

WILLIAM ALLEN WHITE
SCHOOL OF JOURNALISM
AND MASS COMMUNICATIONS

THE SIMPLE ROAD

Branding Guide

Prepared by: Crossroads Creative



INTRODUCTION

Uncovering the brand you already have.

Perception Audit:

The *Simple Road Toward Financial Freedom* currently presents a brand that feels trustworthy, professional and approachable. The visuals use a teal, navy and gold palette.

The imagery of an open road represents a journey of progress, aligning with the idea of taking control of one's financial path. Through its website, social media and book language, The Simple Road uses a friendly and encouraging tone that simplifies complex financial topics and focuses on actionable advice that feels achievable for readers.

Existing Identity

Key Words:

- Simple,
- Trustworthy
- Empowering
- Practical
- Educational



What the Brand Already does Well:

Strong Visual Identity: Consistent colors, "road" imagery

Approachable Expertise: Authors Mark Schlipman and Steve Short blend credibility with relatability.

Clear, Actionable Guidance: Framework examples make financial freedom feel realistic.

Positive Emotional Tone: Encouraging voice helps readers feel capable and empowered.

Mission Statement:

"The Simple Road Toward Financial Freedom helps individuals gain control of their money and achieve financial independence through approachable guidance and actionable steps that make financial wellness feel attainable for everyone."

CONTENTS

INTRODUCTION

Uncovering the brand you already have.

CHAPTER ONE

Refreshing the brand. (Creatives)

CHAPTER TWO

Discovering your brand's core values.

CHAPTER THREE

Connecting with your target audience.

CHAPTER FOUR

Developing a consistent message. (Voicebook)

CHAPTER FIVE

Bringing it all together.

CHAPTER ONE

Refreshing Creatives

This refresh introduces a lighter and more cohesive palette allowing The Simple Road to maintain credibility while connecting with Gen Z audiences who value transparency and approachability in financial education.



Current Colors



The brand colors convey authority and reliability, which helps ensure credibility. However, these tones lean toward a more serious style, which can feel too corporate at times.

Refreshed Colors



This refreshed palette symbolizes a brighter and more cohesive brand. The addition of a softer blue emphasizes clarity, which aligns well with The Simple Road's core values and identity. The golden warm reflects as trustworthy and professional. The lighter shades improve approachability.

Typography

A sans-serif typography complements the palette's approachable and professional tone, creating consistency across digital and print materials.

(H1) Montserrat Bold
(H2) Montserrat SemiBold
(Body) Montserrat Regular

CHAPTER TWO

Discovering Core Values.

Purpose

The Simple Road exists to fill the gap traditional education left behind. Too many people enter the workforce without learning how to budget, save, or plan for their future, which can make financial independence feel out of reach.

Our mission is to change that. We believe everyone deserves access to simple, trustworthy, and actionable guidance that makes money management feel approachable. The Simple Road helps people understand their finances step by step so they can move forward with confidence.

Core Values

Transparency

We believe financial education should be honest and straightforward. There's no jargon, no confusion, just clear, relatable information designed to help people make smart decisions.

Empowerment

Our approach is grounded in encouragement. We guide like a mentor, approachable, supportive, and real, helping people see how easy it can be to take the next step toward independence.

Clarity

Money doesn't have to be complicated. By breaking down complex concepts into simple, actionable steps through frameworks like the 50/20/30 model and the 3-Bucket System, we make financial learning accessible to everyone.

Growth

We believe in progress over perfection. Whether it's saving a little more each month or finally understanding your benefits, every small win matters. The Simple Road celebrates those steps and encourages lifelong learning.

CHAPTER TWO

Discovering Core Values.

How Our Values Connect

Each of these values works together to build the foundation of The Simple Road's mission. Transparency creates trust, empowerment builds confidence, clarity provides direction, and growth ensures lasting progress. Together, they make financial freedom feel both achievable and within reach.

Brand Story

The Simple Road began with a simple realization: financial literacy shouldn't be reserved for experts. Everyone, whether a student, graduate, or new professional, deserves to feel confident managing their money.

What started as a way to teach practical money skills has grown into a broader mission: to make financial freedom simple, actionable, and attainable. We believe that when people understand their finances, they gain more than wealth, they gain peace of mind and the ability to shape their future.

CHAPTER THREE

Make a Connection

"The Simple Road to Financial Freedom" connects with its target audience by first understanding what they already feel and know about money. Managing finances is often overwhelming or confusing, including navigating student loans, health insurance costs, and staying on top of budgeting apps. Readers face many real challenges that can make financial planning intimidating.

The Simple Road meets its audience where they are, offering a clear, step-by-step roadmap that makes money management approachable, and helps young individuals feel confident in taking control of their financial future.



Ele Chier, a 22-year-old pharmacy student at the University of Kansas, lives in Lawrence working part-time as a pharmacy intern at Dillions. Chier feels unprepared to make major financial decisions and struggles with budgeting, which often leaves her feeling overwhelmed and confused. Distractions make it difficult for her to stay focused when learning about finances, but short videos maintain her attention.

Whitney Branner, a 23-year-old living in KCMO, recently graduated from the University of Kansas with a degree in Business and is now working as an accounting administrator. Branner felt fairly prepared about financials after receiving her degree but still relies on her parents for some expenses. Many of her concerns involve long-term savings and spending responsibility in her post-grad life.



CHAPTER FOUR

Voicebook

The Simple Road Is:

Informative: Communicate in clear and simple terms.

Straight-forward: Practical advice without complicated financial jargon.

Friendly: Welcome those on various financial journeys.

Trustworthy: Rooted in education rather than trying to "sell"

Guiding: Turn complicated subjects into something easy to digest. Offer advice like a mentor rather than an authoritative figure.

Empowering: Instill confidence from a place of understanding.

Knowledgeable: Tested and true advice built on experience.

Confident: Steady, sure and trustworthy tone

What We Are Not:

Dismissive: No question is dumb. Guide and encourage curiosity.

Condescending: Don't talk down to anyone but give advice in a friendly and approachable manner

"Get rich fast": We won't make promises we can't keep. Instead, focus on long-term choices and habits.

Out of touch: The Simple Road is built on real-world experiences, so we know the struggle is real.

Rigid: Recognizes that each path to financial freedom is different.

Intimidating: No one should get buried in jargon they don't understand. Make financial topics accessible

How We Talk:

TikTok - Trendy, simplified, informal, comedic, slang.

Instagram - Engaging, conversational, encouraging, bright

Facebook - Longer form, educational, reflective, polished.

Website - Captivating, sincere, authentic, clear.

YouTube - Short-form, educational, honest, polished.

CHAPTER FOUR

Do's and Don'ts Of Media

Do Say/Do!	Avoid Saying/Doing!
Brand voice should sound original and human. Your audience should be able to connect with the humans behind the posts.	Do not reuse the same content for each platform. Each platform should have its own unique voice and varied content.
Encourage engagement in your posts. Offer opportunities for consumers to interact and establish community.	Do not try and target multiple audiences. Stick with content and brand voice that will continue to appeal to the same audience.
Offer a variety of forms of content. Utilize trends by posting a variety of graphics and short-form videos.	Don't participate in trends if they do not align with brand values or make sense with the target audience.

Instagram

The Simple Road utilizes Instagram to engage, build relationships and further educate.

Do's:

- Post consistently. Aim for 3-5 times a week. Best time to post is **Tuesday-Thursday from 11 A.M to 6 P.M.** Avoid posting on Saturday's.
- Increase engagement by posting interactive content on story (polls, question boxes, etc.)
- Post engaging content that stops the scroll (think bright and engaging graphics)

Don'ts:

- Use condescending language. Always keep a guiding, yet warm tone to keep the audience engaged.
- Reuse the same template for every post. Make sure to include a variety of engaging posts formats and graphics.
- Post overly formal content. Leave room for the brand to feel relatable.

CHAPTER FOUR

TikTok

The Simple Road utilizes TikTok to post trendy, conversational and in-the-moment content. TikTok is more lighthearted but should still reflect brand values.

Do's:

- Post consistently. Aim for 3-5 times a week. Best time to post is **Monday-Thursday from 5 P.M to 9 P.M.** Avoid posting on Sunday's.
- Use short-videos to capture and maintain the attention of the audience.
- Focus on engaging with the audience (respond, like and answer any questions)

Don'ts

- Post predictable content. Keep it fun, lighthearted and captivating.
- Try to model too much off of other brands. Don't be afraid to have a unique voice.
- Push the product. Focus more on building and engaging an audience for the overall brand.

Facebook

The Simple Road utilizes Facebook to post longer-form and more polished content. While the tone may be more serious, a personal and engaging feel should still be present.

Do's:

- Post consistently. Aim for 2-3 times a week. The best time to post is between **8 A.M. to 6:00 P.M, Monday- Friday.** Avoid posting on Sunday's.
- Use inclusive language like "we" "let's" and "together" to reinforce community.
- Use longer form content to teach gently. Offer lessons from the book or personal stories to humanize the brand.

Don'ts

- Be overly formal, Facebook should be a platform for meaningful connection.
- Re-use the same content from other platforms. Focus on creating original content to engage the audience.
- Use the same template for every post. Creating unique content will help stop the scroll and captivate a more engaged audience.

CHAPTER FOUR

YouTube

The Simple Road utilizes YouTube to post "bite-size" money tips. Utilize storytelling and focus on building trust by posting consistently.

Do's:

- Post consistently. Aim for at least 1 time a week. The best time to post is Tuesday and Wednesday between 6 P.M. and 7 P.M. Avoid posting on Sundays.
- Make sure you are speaking to the correct audience. The brand should be focused on talking to Gen Z.
- Utilize themed series (Money Management or Financial Myths that Keep You Stuck.

Don'ts

- Overly script the videos. While they should be organized and structured, they should still maintain a conversational feel.
- Only show someone talking to the screen. Add visuals or charts to help break up the content.
- End posts abruptly. End with a summary and a key takeaway for each video.

Website

The Simple Road uses its website to guide consumers to the next step (purchasing a book, signing up for emails, etc.). It reflects the brand's values and allows for deeper connection.

Do's:

- Make sure the menu bar and tabs are simplistic and easy to navigate.
- Implement visual simplicity by using calm, refreshed colors.
- Create community by showing behind the scene pictures, testimonials, etc.

Don'ts

- Rely on generic copy. Make sure all text feels personal and warm.
- Bury important info. Important content should be quickly and easily located.
- Overload the home page. Utilize tabs to help organize information.

CHAPTER FIVE

Brand Blueprint

Purpose: Help young adults take control of their money and achieve financial freedom simply and stress-free.

Vision: A world where young adults feel confident, informed, and empowered to make smart financial choices.

Mission: Provide easy-to-understand guidance, practical tools, and real-world strategies to make financial freedom achievable.

Values: Simplicity · Empowerment · Trustworthiness · Accessibility

Personality & Voice:

Personality Traits: Approachable, Encouraging, Practical, Honest,
Tone: Friendly and supportive.

Brand Positioning:

Target Audience: Young adults 18-30 seeking financial control and overwhelmed by traditional finance advice.

Market Insight: Most financial guidance is overly complex and disconnected from real challenges.

Brand Promise: We make finance simple, relatable, and achievable.

Differentiator: Approachable language, relatable stories, step-by-step guidance designed for young adults.

Experience:

Touchpoints: Instagram, TikTok, Facebook, LinkedIn, Website/Blog
Behavior Guidelines: Speak clearly, encourage small wins, celebrate progress, avoid judgment or overly technical jargon

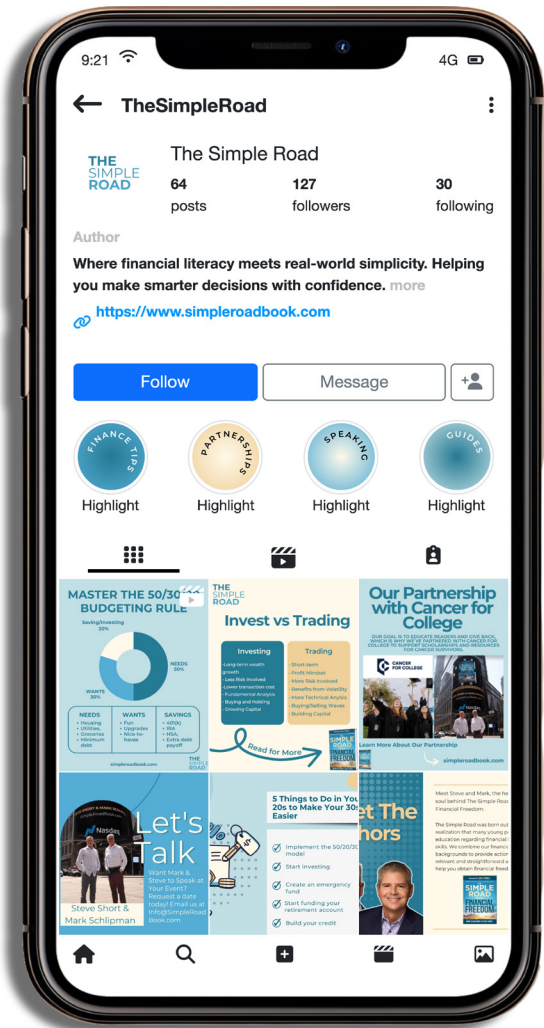
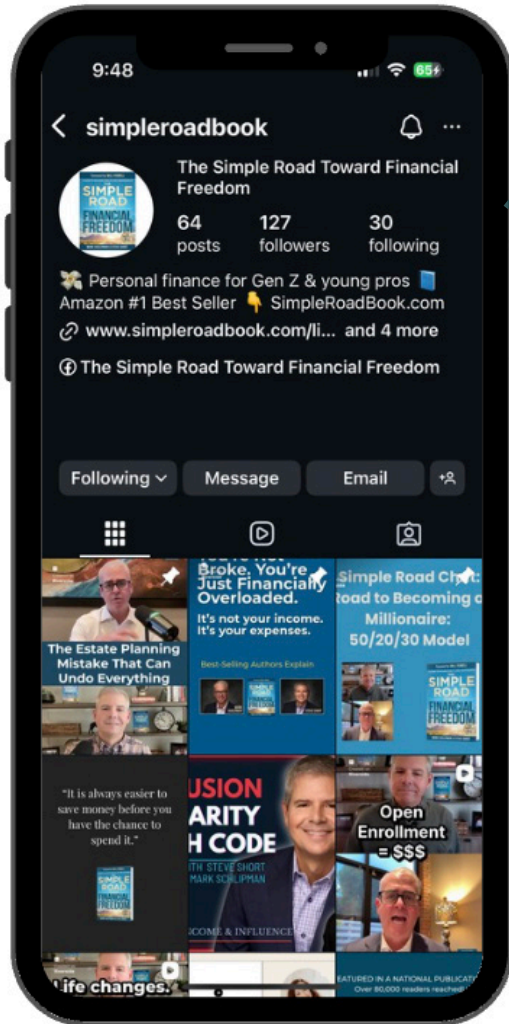
Messaging Framework:

Tagline: "Your journey to financial freedom starts here."

Elevator Pitch: Helps young adults master money without stress through stories, actionable advice, and step-by-step guidance.

Key Messages: Start Where You Are · Keep It Simple · Build Habits, Not Hacks

Refreshed Branding



THE SIMPLE ROAD

MICRO-INFLUENCER GUIDE



WHAT IS MICRO-INFLUENCER MARKETING?

Generally, a Micro-Influencer is defined as a social media user who promotes niche topics with a range of 1,000-100,000 followers. They often take part in partnerships or promotions, which helps establish a trusted and smaller community within the platform itself.

Each social media platform has the opportunity to reach a broader target audience while still playing a crucial role in any campaign. Micro-Influencers are often a more cost-effective route and help create long-term partnerships. It's important to set clear deadlines, goals, and guidelines to ensure the content is accurate across your brand's values.

WHAT PLATFORMS?

Considering your target audience's media consumption habits is crucial when deciding which platforms to partner with.

The most effective platforms are Instagram and TikTok due to its short form content, algorithms, and authentic tones. Instagram is more direct while TikTok algorithm is always pushing niche content.

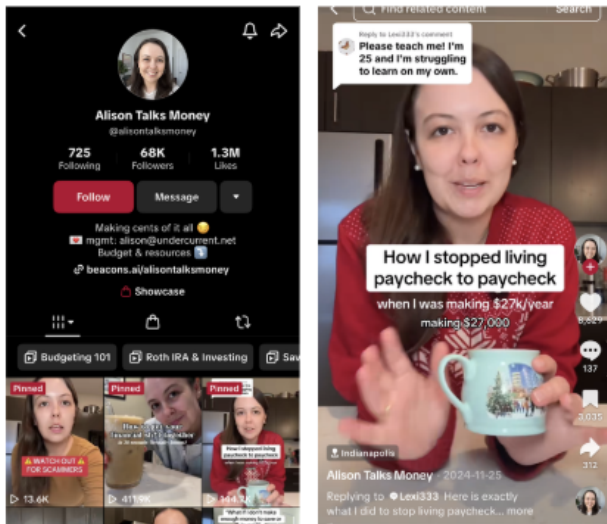
14.22%
OF RESPONDENTS GET THEIR
FINANCIAL INFORMATION
FROM SOCIAL MEDIA.



32%
PREFER SHORT POSTS WITH
QUICK FINANCIAL TIPS

BEST PRACTICE EXAMPLES

The following are examples of Micro-Influencers best practices. While not all align under the financial umbrella, they each have proven their ability to build trust, engage with their target audience, and keep a consistent voice. All of which are important factors to keep in mind when selecting who to partner with.

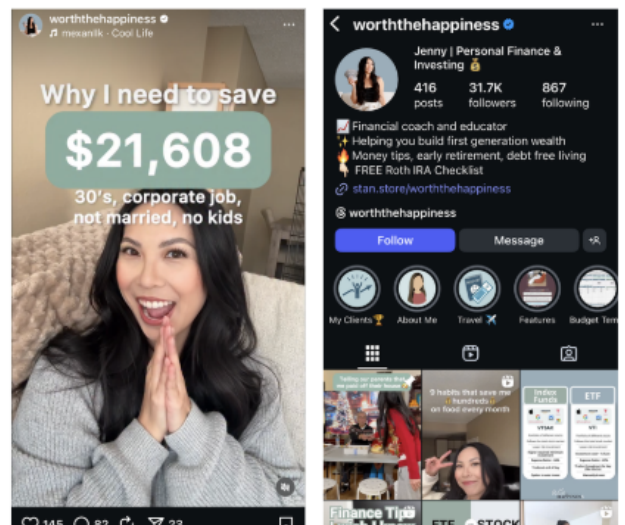


Allison Talks Money - TikTok

- “Making cents of it all”
- Budgeting and resources
- Talks about current spending trends and how to avoid them
- Geared towards young adults first entering the workforce
- Uses her real stats on salary, spending, budget, etc.
 - (very transparent)
- “How to build your financial portfolio”

Worththehappiness- Instagram

- Targeted for young people, ages mid-20s to early 30s
- Financial coach and educator
- Tips on saving money, early retirement, and debt-free living.
- Media mix between video content and engaging graphics



WHAT DO WE SAY?

Most micro influencers post their work emails in their bios or LinkedIn. This is the best way to reach out to them and come across as professional. Make your subject line stand out by being short and personalized.

Key Elements to Include

- Personalized messaging
- Offer a unique value proposition.
 - “Why should they help you?”
- A clear call to action
- Effort to maintain future relationship
- Follow up – These individuals receive many emails a day.
- Do your research
 - Let them know their stats and that you appreciate their work.

Value Proposition

This is your time to “brag” about your book. “Partner with us help to young adults build their wealth and reduce their stress through approachable and practical financial advice in our bestseller.”

- Highlight the actionable steps.
 - 50/20/30, Save-First Model, STL
- Benefits of building both of your target audiences
 - This is an opportunity to provide credible and brand-safe advice.
- Cancer for College (mission/social impact)
- Credibility – author’s experience, leadership, and Amazon Bestseller

PAYMENT OPTIONS

It’s important to note that the level of payment and options for each micro influencer vary. Below are some potential options they are familiar with.

- Free Book to every micro-influencer.
- Affiliate Commission (allows them to earn a percentage of every sale through unique promo codes) - these are also measurable.
- Flat-Rates for Content - All content runs through you first, but you can charge a flat payment for social posts.

UTM Social Tracking

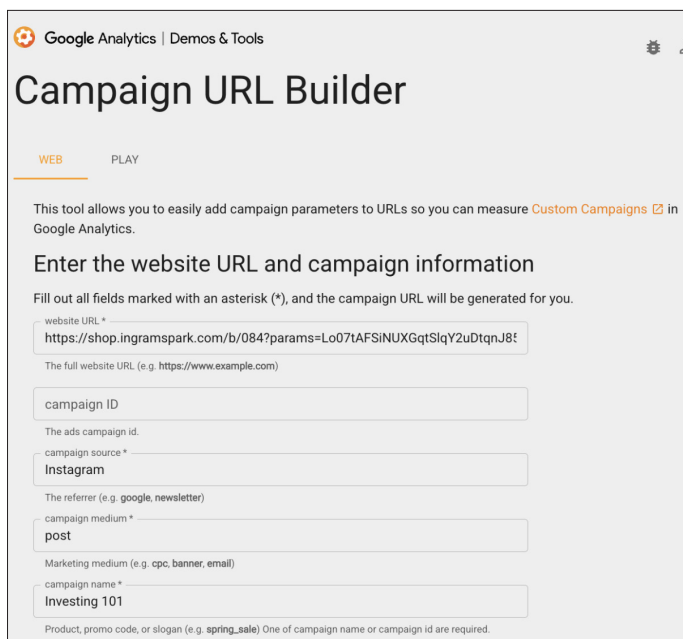
A UTM (Urchin Tracking Module) is a piece of a URL that allows the website to track exactly where the traffic is coming from.

Why use it?

- They are especially effective for social campaigns and conversion tracking.
- UTM's are often broken down by source (Facebook, Google, Instagram), Medium (email, static post, reel), and Campaign (Podcast features, Investing 101, Open Enrollment).
- Allows users to see exactly what posts and platform is generating the most traffic to a certain URL.

How?

- Google Analytics has a free URL Builder that can be used for individual social campaigns.
- Shorten the link through platforms like Bitly.
- Once that UTM is shortened, place it in your designated CTA and begin tracking where your traffic is going.



The screenshot shows the 'Campaign URL Builder' interface in Google Analytics. It includes a 'website URL' field with the example 'https://shop.ingramspark.com/b/084?params=Lo07tAFSiNUGqtSlqY2uDtqnJ8!', a 'campaign ID' field, a 'campaign source' field with 'Instagram' selected, a 'campaign medium' field with 'post' selected, and a 'campaign name' field with 'Investing 101' entered. A 'SHORTEN LINK' button is visible at the bottom right of the interface.

Quick Tip:

- Do not generate traffic to your homepage if your goal is conversions. Instead link to the "buy the book" tab.



Use this URL in any promotional channels you want to be associated with this custom campaign.

generated URL

https://shop.ingramspark.com/b/084?params=Lo07tAFSiNUGqtSlqY2uDtqnJ85hjnXdQT01hA67GI&utm_source=Instagram&utm_medium=post&utm_campaign=Investing+101

Set campaign parameters in the fragment portion of the URL (not recommended)

shortened URL

Click shorten link to shorten your generated URL.

SHORTEN LINK

Social Mock-ups

The following are some examples of social posts using the re-branding. For more details on platform and posting consistency please refer to the voicebook deliverable.

Facebook

 **The Simple Road**
Yesterday at 12:00 PM · 🌐

Meet the minds behind The Simple Road.

Steve & Mark built this book to help you feel confident, capable, and in control of your money, no matter where you're starting 🐝

Visit our website to learn more 🌟



Meet The Authors

Meet Steve and Mark, the heart and soul behind The Simple Road to Financial Freedom.

The Simple Road was born out of a realization that many young people lack education regarding financial literacy skills. We combine our financial backgrounds to provide actionable, relevant and straightforward advice to help you obtain financial freedom.



LEARN MORE ABOUT OUR STORY:
<https://www.simpleroadbook.com/home-page>

  102


21 Comments 10 Shares

 Like

 Comment

 Share

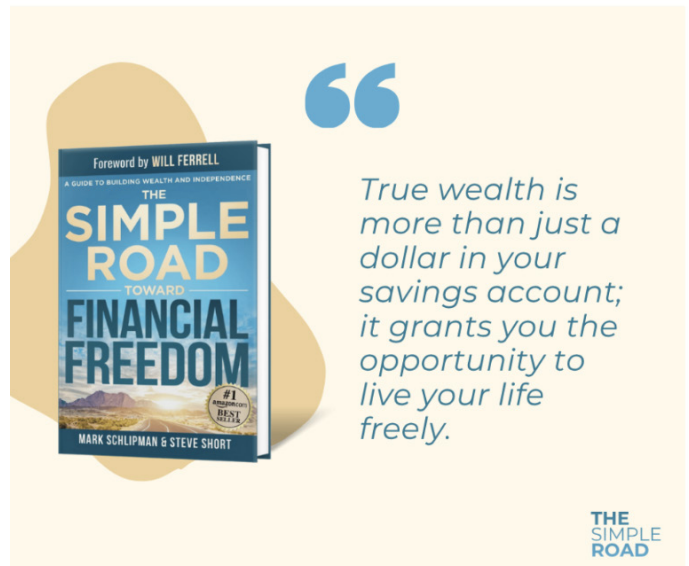
View more 6 Comments

 **The Simple Road**
4 days ago at 6:00 PM · 🌐

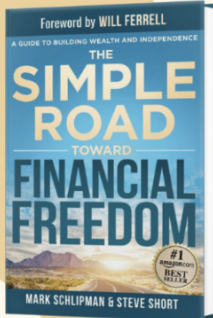
Money isn't the goal... freedom is 🌟

This is your reminder to build a life you can actually live 🐝

Grab the book for more advice on how to unlock financial freedom
#TheSimpleRoad #FinancialFreedom #MoneyTips



“
True wealth is more than just a dollar in your savings account; it grants you the opportunity to live your life freely.”



THE SIMPLE ROAD

  42

6 Comments 2 Shares

 Love

 Comment

 Share

View more 16 Comments



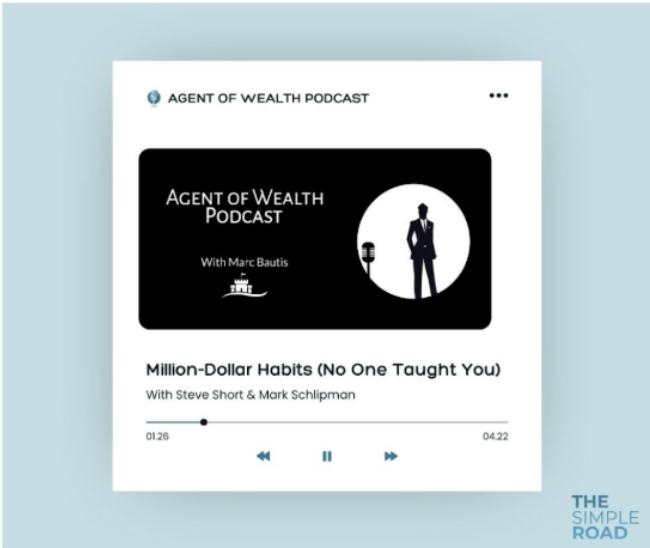
The Simple Road @Marc Bautis
Tuesday at 12:00 PM · 🌐

🔔 New podcast alert!

We joined the Agent of Wealth Podcast to discuss why financial literacy is missing in schools, how small habits can add up to \$1M, and why our book is designed to "age with you" from your first job through retirement.

Click the link in bio to listen 🖱️

#SimpleRoad #AgentofWealth #NewEpisode #MoneyTips



👍❤️ 72

18 Comments 1 Share

👍 Like

💬 Comment

➦ Share



The Simple Road
3 days ago at 10:00 AM · 🌐

Small habits today equal big relief later 🔥

These 5 steps can make your 30s smoother, less stressful, and a whole lot more fun ✨ If you could give your younger self one piece of advice... what would it be 🖱️

#TheSimpleRoad #FinancialFreedom #MoneyTips



👍❤️ 57

7 Comments 2 Shares

👍 Like

💬 Comment

➦ Share

Social Mock-ups

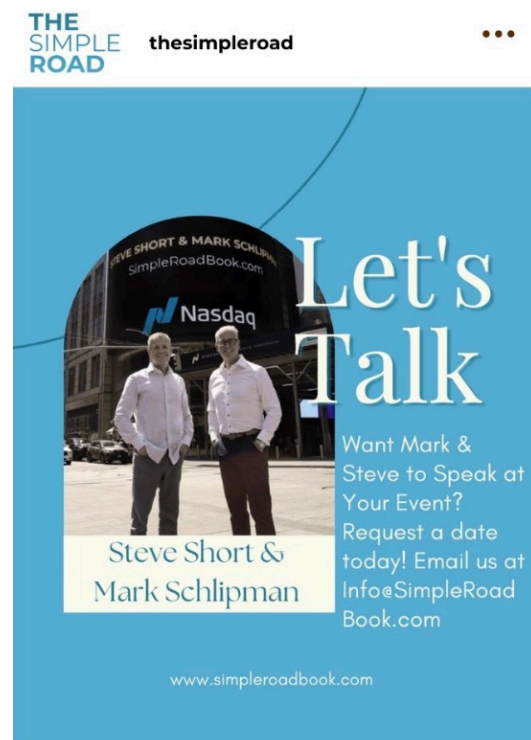
The following are some examples of social posts using the re-branding. For more details on platform and posting consistency please refer to the voicebook deliverable.

Instagram



thesimpleroad

We're proud to partner with Cancer for College, helping provide scholarships and resources for cancer survivors pursuing their dreams. Learn more about our partnership at simpleroadbook.com
#TheSimpleRoad #GiveBack #CancerForCollege #FinancialFreedom #Impact



thesimpleroad

🌟 Ready to bring Mark & Steve to your event? 🌟
Don't wait—let's chat and schedule your booking today!
#MarkAndSteve #EventSpeakers #BookNow #LetsTalk #EventPlanning #ReserveYourSpot



thesimpleroad

True financial freedom starts with knowing where your money goes. ✨The 50/30/20 rule is a simple roadmap to help you cover what you need, enjoy what you want, and build the future you dream of. For more money tips, check out our book at the link in our bio!
 #TheSimpleRoad #FinancialFreedom #BudgetingTips #MoneyTips

Invest vs Trading

Investing	Trading
<ul style="list-style-type: none"> • Long-term wealth growth • Less Risk Involved • Lower transaction cost • Fundamental Analysis • Buying and Holding • Growing Capital 	<ul style="list-style-type: none"> • Short-term • Profit Mindset • More Risk Involved • Benefits from Volatility • More Technical Analysis • Buying/Selling Waves • Building Capital



thesimpleroad

Whether you're building long-term stability or navigating short-term moves, clarity is key. Learn more inside *The Simple Road Toward Financial Freedom*—link in bio!

#TheSimpleRoad #Investing #Trading #FinancialLiteracy #MoneyTips

Social Mock-ups

The following are some examples of social posts using the re-branding. For more details on platform and posting consistency please refer to the voicebook deliverable.

LinkedIn



Want a simple routine for every paycheck? Start **here**:

1. Schedule transfers around payday. Automate it so you never "see" the money leave.
2. Fund Bucket 1 (bills buffer), then Buckets 2 & 3
Aim for 20% saving/investing target across those buckets.

3. Invest 1-2 days after the transfer clears
Simple, consistent, and stress-free.

Learn More: simpleroadbook.com
#GenZMoneyMentors #AdultingWithEase
#MoneyMadeSimple #FinancialConfidence #GenZFinance

We love helping teams & students build confidence with their money. Our workshops are high-energy, practical, and packed with real-world steps people can use right away. From the 50/20/30 Save-First Model™ to avoiding costly financial mistakes, we bring clarity, confidence, and simple habits that help young professionals reduce stress and stay focused.

Want this for your team?

Speaker sheet: SimpleRoadBook.com
Contact us at Info@SimpleRoadBook.com
#GenZMoneyMentors #GenZMoneyTalks
#FinancialWellness #WorkplaceWellness
#FinancialFreedom #PersonalFinance



Tune In!



*Investment Masterminds Podcast
featuring Mark Schlipman and Steve Short*

We had a great time joining the Investment Masterminds podcast to talk about simple, actionable ways to build long-term financial freedom.

In this episode, we break down the principles behind The Simple Road Toward Financial Freedom—including the habits, mindset shifts, and frameworks that help investors take meaningful action.

If you're looking for clear steps to strengthen your financial future, this is a conversation worth tuning into.

Listen to Episode 56: Investment Masterminds
#MoneyMadeSimple #GenZMoneyMentors

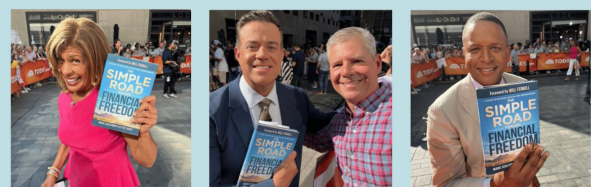
Financial confidence matters – and The Simple Road Toward Financial Freedom, an Amazon Bestseller, offers employees and young professionals a clear, accessible path toward it.

Straightforward frameworks. *Actionable steps.* A resource they can use immediately.

Buy on **Amazon** Today!

#FinancialWellbeing #AmazonBestseller
#MoneyMadeSimple #FinancialFreedom

Amazon Bestseller



"A simple, easy to digest road map on how to be in the driver seat with your finances."



Social Mock-ups

The following are some examples of TikToks using the re-branding. For more details on platform and posting consistency please refer to the voicebook deliverable. Keep in mind these are only thumbnails to keep a cohesive profile.

TikTok

Give Back Stories

- *Since proceeds support Cancer for College, make a TikTok about that mission: "When you buy this book, you're also helping cancer survivors go to college." Highlight the nonprofit and why it matters.*

The Money Rule That Made Sense (50/30/20)

- *"If you've ever felt overwhelmed by budgeting, try the 50/30/20 rule. Fifty percent for your needs, thirty percent for your wants, and twenty percent for savings. It keeps things simple, realistic, and stress-free, especially when money starts to feel confusing."*



Financial Questions You're Not Dumb for Asking

- *Person 1: "What even is a credit score?" "How much should I save every month?" "Do I need a budget if I don't make a lot?"*
- *Person 2: You're not clueless for asking basic questions. Seriously. No one teaches this stuff, and you're not supposed to just know it. That's why we break it down in a clear way and judgment-free way... so you can feel confident with your money. Follow us if you're ready to learn the basics.*

Weekly money check list/ payday money checklist

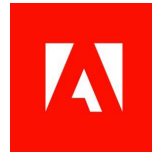
- *"Payday? Before you spend a dollar, run through this quick money checklist."*
 - 1st: *pay yourself first, move money into your savings or investments."*
 - 2nd: *Cover your essentials. Bills, groceries, and anything non-negotiable."*
 - 3rd: *Add to your annual goals, big or small purchases.*



Social Scheduler

Plan ahead with platforms that simplify scheduling, save time, and handle the posting for you.

Potential Platforms



Adobe Scheduler

- Uses Adobe Express to schedule posts. Great option if you are already designing posts in Adobe Express.
- Currently \$0.00/month for basic content creation tools and limited generative AI assets.
- 1 account per social network

Buffer

- Great industry standard option.
- Currently \$0.00/month for basic level that connects up to 3 channels. (Instagram, Facebook, LinkedIn) *limit 10 posts
- \$5/Month for unlimited posts per channel.

Set as draft

12/02/2025, 09:00 AM

Edit post

Plan, schedule, and publish content to multiple social platforms.



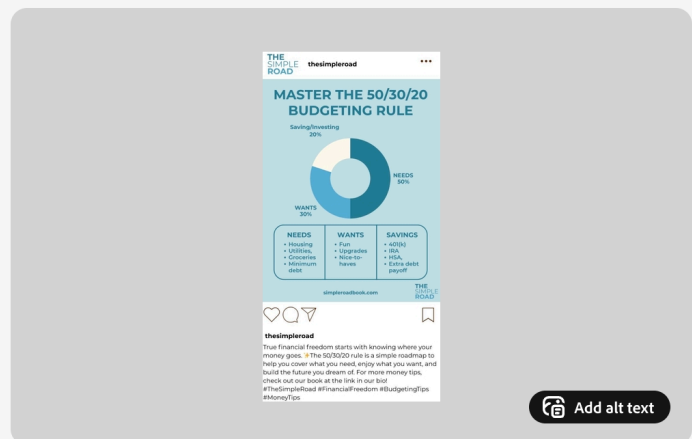
Start connecting

Caption

Instagram:
True financial freedom starts with knowing where your money goes. ✨
The 50/30/20 rule is a simple roadmap to help you cover what you need, enjoy what you want, and build the future you dream of.
For more money tips, check out our book at the link in our bio!
#TheSimpleRoad #FinancialFreedom #BudgetingTips #MoneyTips

Generate

Adobe generative AI terms



Add alt text



December 2025

Week Month Grid

Mon	Tue	Wed	Thu	Fri	Sat
<p>Cyber Monday</p> <p>Facebook: It's never t... ● Draft 9:00 AM</p> <p>TikTok ● Draft 6:00 PM</p>	<p>How it Started</p> <p>Giving Tuesday</p> <p>Maximize your paych... ● Draft 9:00 AM</p> <p>Instagram: True finan... ● Draft 12:00 PM</p> <p>TikTok ● Draft 7:00 PM</p>	<p>Instagram: Whether y... ● Draft 3:00 PM</p> <p>Why financial planni... ● Draft 6:30 PM</p> <p>TikTok ● Draft 8:00 PM</p>	<p>Expert Review</p> <p>We love helping tea... ● Draft 1:00 PM</p> <p>Instagram: We're pro... ● Draft 5:00 PM</p>	<p>Facebook: Every jour... ● Draft 10:00 AM</p> <p>Instagram: Small step... ● Draft 2:00 PM</p>	
<p>8</p> <p>Facebook: We had th... ● Draft 9:00 AM</p>	<p>9</p> <p>Favorite Five Books</p> <p>LinkedIn: We had a g... ● Draft</p>	<p>10</p> <p>Bring inspiring voices... ● Draft 3:00 PM</p>	<p>11</p> <p>Favorite Resources</p> <p>LinkedIn: Financial c... ● Draft</p>	<p>12</p> <p>Facebook: True wealt... ● Draft 10:00 AM</p>	<p>13</p>

Edit post

Plan, schedule, and publish content to multiple social platforms.

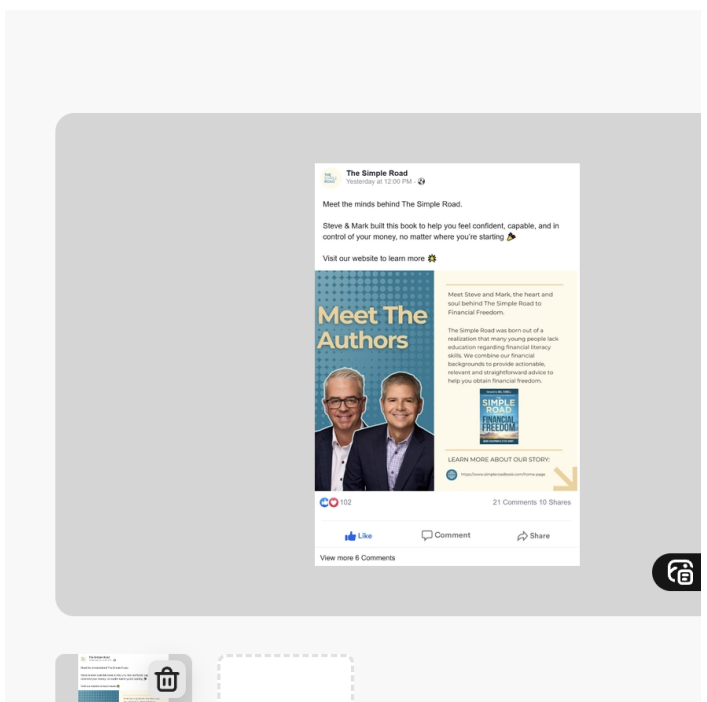


Start connecting

Caption

Facebook:
Every journey has a beginning 🌱 For Steve and Mark, it began with a shared belief that financial knowledge should be accessible and straightforward.

Their combined knowledge and experience created a book designed to educate, empower and help you gain financial confidence 📖



Refreshed Website

Below is our refreshed website designed to simplify navigation, highlight the authors, and create a clear path toward financial freedom.

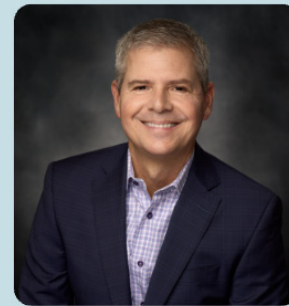




Mark Schlipman

Co-Author

Mark Schlipman is a financial advisor with over 25 years of experience and co-author of The Simple Road Toward Financial Freedom. As the founder of Schlipman Wealth Advisors, he's dedicated to making money simple and approachable for young professionals. Mark helps readers and clients alike understand the "why" behind their finances so they can make confident, lasting decisions about their future.



Steve Short

Co-Author

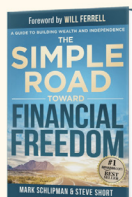
Steve Short is a business leader and co-author of The Simple Road Toward Financial Freedom. After years leading major divisions across travel, tech, and retail, he's now focused on helping young adults gain financial confidence. Steve simplifies money through practical lessons on budgeting, saving, and long-term planning — showing that anyone can start building wealth with the right mindset and tools.



START YOUR SIMPLE ROAD TODAY

Most money books miss the mark, too **confusing** or too **basic**.

The Simple Road cuts through the noise with **real-world** advice that actually makes sense and helps you take **action**.



OUR STORY

The Simple Road began with a simple realization: financial literacy shouldn't be reserved for experts. Everyone, whether a student, graduate, or new professional, deserves to feel confident managing their money.

What started as a way to teach practical money skills has grown into a broader mission: to make financial freedom simple, actionable, and attainable. We believe that when people understand their finances, they gain more than wealth, they gain peace of mind and the ability to shape their own future.

Ads and Keywords

Keyword Research

Keyword Research

- These are high, medium and low competition keywords found through Google Ads that align best with our audience.
- This research is a great way to see where demand is already in the market. It helps us see what people are searching for.
- Using these keywords on landing pages, target ads, etc will help drive more intentional traffic to your pages.
- Volume tells us how many people search the keyword each month. Bid Low and Bid High tell us the cost range advertisers usually pay per click for that keyword in Google Ads.

Google Ads Cost Per Conversion For Books

Always up-to-date Google Ads cost and performance metrics from billions of dollars of annual ad spend per month

Summary of Google Ads Cost Per Conversion For Books

- Median Cost Per Conversion on Google Ads for books companies is **\$11.11** in April 2025
- Median Cost Per Conversion on Google Ads for books companies decreased by **-9.29%** compared to last month

Want customized Google Ads performance reports and insights? [Connect your data](#)

CHANNEL	MEDIAN	RANGE
Performance Max	\$13.17 +5.25%	\$12.25 - \$15.5
Search	\$10.13 +23.69%	\$7.05 - \$17.31
Shopping	\$11.79 -39.71%	\$8.64 - \$12.45
NETWORK		
Mixed	\$13.17 +5.25%	\$12.25 - \$15.5
Search	\$10.58 -13.63%	\$8.59 - \$20.74
Search (Partner)	\$15.15 +59.56%	\$8.58 - \$319.08

SUMMARY TABLE

Competition	Keyword	Volume	Bid Low	Bid High	Why It Was Chosen
High	beginner investing	500	2.18	7.64	High volume; perfect match for 20s
High	personal finance books	50	0.16	0.64	Cheap CPC + perfect product match
High	money help	50	3.88	10.43	High urgency; strong buyer intent
Medium	financial advisory services	50	7.84	18.15	High-intent alternative to hiring advisor
Medium	financial education books	50	—	—	Exact match for what you're selling
Medium	free financial	50	—	—	Captures value-seeking 20-somethings
Low	financial literacy	500	4.50	26.25	Very high volume for low competition
Low	financial planning	500	6.67	21.46	High value and low competition
Low	personal finance	500	3.73	12.68	Broad, high-volume early-career interest

META Ads



**Why You Feel Broke
(Even With a Good
Income)**

FIND OUT WHY >

**THE
SIMPLE
ROAD**

READER
Reviews



“

"With this book as my roadmap, I paid off over \$10,000 in debt in 3 months. Having a clear plan and benefits laid out was a huge motivator. Highly suggest this for anyone who doesn't love learning about finances but wants real results."

Kindle User

★★★★★

”

CLICK TO PURCHASE



THE MONEY MOVE YOUR
FUTURE SELF
WILL THANK YOU FOR

**THE
SIMPLE
ROAD
TOWARD
FINANCIAL
FREEDOM**

A GUIDE TO BUILDING WEALTH AND INDEPENDENCE

f @simpleroadbook


LEARN HERE >

**THE
SIMPLE
ROAD**

CLAIM YOUR BONUS!

Get your free annual review checklist with the purchase of The Simple Road Book.

CLICK HERE



ANNUAL REVIEW
CHECKLIST

Thank You



We would like to thank Steve Short, Mark Schlipman, Professor Loewen, and Heather Lawrenz for their support throughout this project. Your guidance, insight, and collaboration helped us shape and execute this campaign. We are truly grateful for the opportunity to learn from each of you.

