

# BRAND DISCOVERY DOC

*A descriptive look into your brand*

## GENERAL BRANDING QUESTIONS

URL

<https://getbrightup.com/>

Email

[hello@getbrightup.com](mailto:hello@getbrightup.com)

Contact Names and Roles

**Val Mosley ("Visionary Val") - Chief Visionary Officer, Growth Guru, Visionary**  
**Connor M. Carroll - Growth Officer**  
**Amaka Uchegbu**

**(fun, hierarchy agnostic)**

Phone Number

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**What services does your company provide?**

*4-6 sentences introducing company including:*

**3 Primary Pillars:**

**1. Access to Fairly Priced Capital**

- a. Most don't have access (expensive rates)
- b. Credit Cards - 17% APR (average)
- c. BU has proprietary AI tech that challenges traditional FICO scoring and expands access to get lower cost capital to refinance high debt
  - i. "Companies do it, why can't consumers?"
  - ii. Removes challenges of growing wealth!
  - iii. Provide financial fluency for communities
    - 1. Resources, Content (context) - weren't taught these in school

**2. Content**

- a. Financial Literacy Videos (short content) - coming soon
- b. Stories and Strategies - coming soon
- c. Educational portal of content tailored to interests

**3. Coaching**

- a. Coming soon, waitlist page - in the roadmap
  - i. Text-buddy

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## ii. Schedule appointment

### About

*4-6 sentences about the company including:*

**BrightUp is an emotionally intelligent financial wellness benefit provider. We help workers and their loved ones grow their net-worth and improve their self-worth. BrightUp believes that how people feel about themselves affects how they treat themselves – particularly when finances are involved.**

**Therefore, BrightUp provides a full suite of financial wellness tools, rooted in an uplifting mobile experience – inclusive for everybody, “we know you’re worth it”**

### Current wealth ≠ net worth

**BrightUp’s flagship offering is a Low Cost Loan that is repaid through paycheck deductions.**

### Vision

*4-6 sentences about the vision now and in the future*

**Help 1 million people improve their wealth in 5 years (reduce cost and amount of debt, increase the opening of accounts that offer asset building)**

**We want everyone to have an equal opportunity to build wealth (providing the tools, coaching and resources)**

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**Democratize wealth building and wealth being**

- **Know your worth, grow your wealth – you’re not alone**

**Help people grow their net worth and know their self worth**

**Compounding fairly priced capital / self, community, and corporate compassion and relatable content**

**Scale financial coaching for all – take what wealth managers have done for a few people and make it more accessible.**

### Core Values

*4-6 sentences about the intrinsic values the company exudes to the masses*

**Authenticity / Credible / Inviting / Compassionate / Caring / Always Improving / Honest / Respectful / Strong / Stable / Listening / Empowering / Inspiring / Encouraging / Safe / Generative / Affirming / Positive / Mindful**

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## **Your Company Tone**

*4-6 sentences about the overall tone of the company*

### **Light tone, not tongue-in-cheek**

- **Care provider type of tone**
- **Finance a source of stress, we're the hand helping the end user not feeling as stressed**
  - **WARMTH - help YOU along this financial journey**
    - **Supportive**
    - **B2C - no employee left behind**

## **Location**

*1-2 sentences describing the MAIN location*

**Boston, MA**

## **What Are the Top Brands You Love?**

*Also describe what you like and dislike about them*

**Nike, Payactiv, Lush, Calm**

## **Main Competitors?**

*Also describe what you like and dislike about them*

**Bright Money - tranquil, calm, nature use**

## **What is Unique Compared to the Competition (USP)**

*What differentiates you from the competition?*

**Behavioral and psychological approach to finance anywhere you are in your journey (from small networth to large).**

**Personalizing financial wellness.**

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## Who is your target audience?

*Please describe 2-3 buyer personas*

### **SENDING TARGET AUDIENCE**

**Less than 100,000 more than 30,000 salary**

Corporations who care and want to help - communities that care about the pains and struggles of their members.

Individuals looking to grow fin health

## What questions are you frequently asked by customers?

**TBD**

## What is the most important call to action you would like site visitors to take?

**Get started - sign up and use the product - individual**

**Engage (complete form, inquire) - corporation**

## What keywords are you trying to rank for on google?

**Financial wellness benefits**

**Reduce financial stress**

**Financial education**

**Financial wellness**

**Financial wellness tools**

**Refinance debt**

**Manage my debt**

**Financial help**

**Visionary Val!**

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## What pages does your website require?

SERVICES, ABOUT...

Home

Products

**Financial Wellness Tools**

**Compassionate Capital**

**Personalized Financial Education**

**Financial Planning Tools**

**Financial Coaching and Advice**

Testimonials

About Us

**Mission**

**Partners**

**Our Team**

**Get Started (set up a meeting)**

**CRM Integration**

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**General Landing Page**