



WALLET MAX

# Impact Report

2022

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# Introduction

**Wallet Max is proud to share with you our progress made this year.**

It is without a doubt that this year was incredible for our team at Wallet Max. We honed in on our mission and the impact we want to make in the world with our products. We grew our global team and shared great milestones along the way.

Now more than ever, we are excited for what the future holds for us a community of innovators, disruptors and changemakers.

As an early-stage start up, many understand the challenges and opportunities that presents especially during these global economic times.

In any case, our team persisted and we are grateful for every single person, partner, advisor and friend that encouraged us along the way and helped craft who we are.

We certainly could not have done this alone.

In this impact report, we will cover our philosophical approach to our work, our team, our programs, the Wallet Max mobile app, online communities and SDG impact.



# Our story so far

## Our Mission

Our mission is to improve overall personal financial wellness and social inclusion by providing tools to help everyone feel empowered and free from financial stress.

Wallet Max is your intelligent financial wellness assistant that proactively saves time and money with lifestyle maximizing digital rewards for socially responsible retail shoppers.

Here at Wallet Max, it is important to find ways to accelerate economic growth in local communities and our approach is to build a platform that offers shoppers exclusive and affordable loyalty discount programs from sustainable small businesses.

We are committed to empowering secure and inclusive financial access for everyone, especially the unbanked and the underbanked, and providing quality investment education globally through our proprietary rewards personalization and real-time predictions engine.

## Our Purpose

Wallet Max is a financial inclusion and economic empowerment community that accelerates rewards-based savings and investments, for socially responsible consumers and sustainable businesses globally.

## Our Values

**Authenticity:** We show up authentically, as ourselves, and do our work with heart and integrity.

**Community:** We are invested in building a thriving community that promotes transparency, radical honesty, respect, communication, and genuine understanding.

**Sustainability:** We ensure our goals and activities have a positive social, environmental, and economic impact that creates a world where everyone can thrive and prosper.

**Curiosity:** We embrace the idea that we are lifelong learners.



# 2022 in review

## 1

### Launched a successful rebrand

Wallet Max successfully rolled out a new updated brand that better represented who we are. Our team created a new color palette, logo variations, typography and visual graphics that deliver a strong, aesthetic and trustworthy brand. We launched June 2022 across all platforms, newsletter and website. Overall, we are pleased with the results and look forward to continued growth of our brand.

## 2

### Launched new Financial Wellness programs

A major component of our mission here at Wallet Max is to offer quality financial wellness education. We want to empower access through free monthly virtual webinars, our annual EMERALD summit and Expert Connect, a resource to find and book financial wellness experts.

## 3

### Developed, tested and launched beta version of Wallet Max mobile app

Over the last 2 years, we have created a concept, tested our idea and ran focus groups to make this a unique and powerful product for the market. This year, we focused on developing our beta version and launching user surveys to get clear insight on the functionality, user experience and user interface.

The success of our trial run caught the attention of Colombia University faculty who ran a case study on our product.

## 4

### Grew customer waitlist and company presence

This year, we set our intentions in defining our guiding values and principles that we can share with the world. Our rebrand encompassed not only a visual transformation of our brand, but also a messaging refresh. We refined and tested language on our social media channels, newsletter and community conversations with financial wellness experts, team members and app users.

# Our SDG goals

We are on a mission to disrupt, transform, and impact the future of personal finance, and financial wellness as a whole, in order to make it inclusive for all.

Being guided by the UN's sustainable goals, we are making conscious advancements in gender equality and economic empowerment, while reducing inequalities.



We thank you for your  
ongoing support of  
Wallet Max.