



sorted
Money Month
1-31 August 2024

Partner Toolkit

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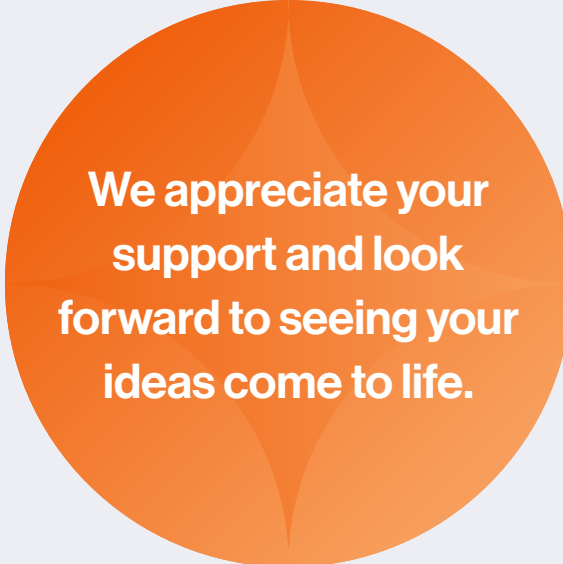
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About Money Month

Money Month is the annual public awareness and engagement campaign coordinated by Te Ara Ahunga Ora Retirement Commission, who run Sorted.

Money Month supports the National Strategy for Financial Capability's goal of helping to demystify money, by providing a dedicated month to raise attention and engagement on money matters. The reach of the campaign is thanks to many financial capability partners getting behind it and working together to support their communities through Money Month. The more organisations that jump on board, the bigger the impact we can have for all New Zealanders.

This campaign is targeted to all New Zealanders, but particularly helpful for those less experienced or overwhelmed by money, who are seeking to increase their knowledge and confidence. We welcome your support to share this campaign with your own people internally, your customers, networks and communities.

A large orange circle with a subtle leaf-like pattern inside, containing white text.

**We appreciate your
support and look
forward to seeing your
ideas come to life.**

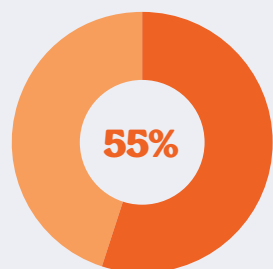
Why does Money Month matter?

Money plays an important role in our lives, but we often avoid thinking too hard about it, which just leaves us feeling powerless. Having a chance to pause during a themed month helps.

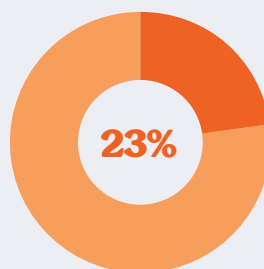
We want people to take simple steps to grow their money and become more resilient, whether that's saving and investing, paying off debt, or making sure they have the right insurance and protection in place.

With the support of community organisations and the financial services sector, we can do more together to help New Zealanders grow their financial wellbeing throughout Money Month.

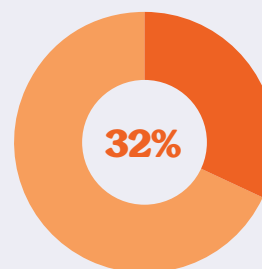
Money Month aims to help New Zealanders feel more in control of their money



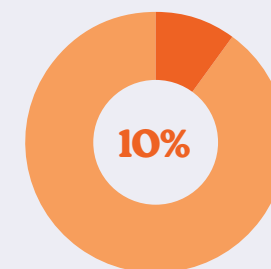
55% of New Zealanders are feeling financially uncomfortable



23% are losing sleep over their finances



32% of are worried about the amount of debt they're in



10% are distracted by money worries at work

How can Money Month have an impact?

In 2023 we coordinated our first ever Money Month, prior to that the campaign had only run for a week. A month-long campaign gave financial capability partners a better opportunity to get involved, to space out more activity, and drive great results.

170

social posts shared
by partners

2.6 million

plays of Sorted videos

17,000

new users to the sorted.org.nz site

58

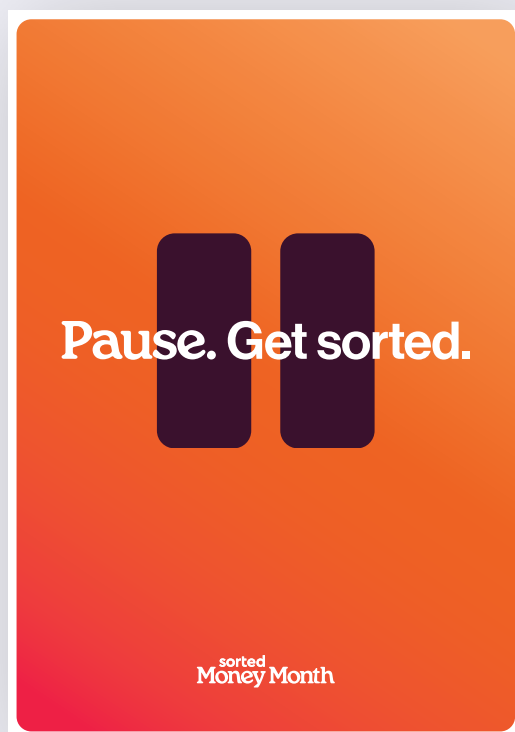
events run by
partners

83

mentions across
NZ media

2024 campaign - Pause. Get sorted.

This Money Month, we are going to be building on the success of last year's theme, encouraging New Zealanders to hit pause and take a moment to get their money sorted.



Resources have been updated this year with a fresh new look and feel, but still include popular assets from last year including the pause symbol with the line 'Pause. Get sorted.' This can be adapted by partners to encourage a moment of reflection or action New Zealanders could take to maximise their money. This could also be used to encourage taking a moment to talk to someone about money or to join an event over Money Month. The assets will be customisable so if you want to make them your own or add your own branding, you are more than welcome to.

We will be focusing on actions that can help people **grow their money** and **build resilience** – two pillars that are key to improving people's financial wellbeing. Think of it as helping people to have **more money for tomorrow** (to meet their future needs) and **more money for today** (at the ready if urgently needed).

To make sure we support New Zealanders to take meaningful action at different stages in their journey, Sorted will be providing money tips on a range of topics including:

- ✓ Everyday money
- ✓ Debt
- ✓ KiwiSaver
- ✓ Saving
- ✓ Investing
- ✓ Protecting wealth

We encourage you to align your Money Month activity to one, or all of these topics and leverage the resources on **sorted.org.nz**.

Key messages

“

In uncertain times, it helps to press pause. This **Money Month**, take time to take charge of your money.

“

This **Money Month**, we invite New Zealanders to pause – take a moment to find opportunities and get sorted.

“

Pause, take charge of your money. Sorting things out can bring a sense of order to other areas of your life, too.

“

Pause. Get sorted. Give yourself the headspace to sort your money.

Key messages - money tips

Our Money Month resources provide assets with tips for your audience so they can be reminded to ‘Pause’, then take an action to get sorted – you can also add your own tips to these assets.

Everyday money

- ✓ Sorting your money doesn't just take care of you – it helps meet the future needs of your whānau.
- ✓ Each payday, give every dollar a job! It makes getting to your money goals easier.
- ✓ Build your budget to plan your spending and saving, making sure you're always earning more than you're spending.
- ✓ A good budget means you're constantly improving your money situation.

Debt

- ✓ Debt doesn't need to be daunting. Having a plan to pay for it puts you in control.
- ✓ Shed your debt – especially the high-interest stuff – to really improve your money situation.
- ✓ Tackling high-interest debts first is the quickest way out. Pay off your priciest debts to get debt free faster.
- ✓ Kick off little things to get the ball rolling – paying smaller debts first can boost your motivation.

Investing

- ✓ Invest to supercharge your savings (like in KiwiSaver). The money you put in grows from compound interest.
- ✓ By taking a calculated risk investing – you can reap rewards and grow your money for your future.
- ✓ Pooling your money in a fund with other investors helps you spread your risk (without your eggs all in one basket).
- ✓ Over time, you can get great results by investing and reach your goals in life.

Key messages - money tips

Saving

- ✓ Saving money isn't just for nice things, it's for emergencies – a safety net for anything unexpected.
- ✓ More saving gives you more options. Even small amounts build up over time.
- ✓ Planning a purchase? Sleep on it, chat about it, wait a few days. Time will tell you if you really need it.
- ✓ Automate everything. Auto-payments for your savings, investing and bills means less to think about.

KiwiSaver

- ✓ KiwiSaver's a team effort! Government and employers contribute to your savings too, and all that money gets invested.
- ✓ Find the right type of fund for you. The difference on average between conservative and growth could be \$130,000!
- ✓ Contribute at least \$20 weekly to your KiwiSaver – the government will put in \$521 every year.
- ✓ Not all KiwiSaver funds are the same! Weigh up the fees, how helpful the provider is, and check past results.
- ✓ Even if you've been in KiwiSaver for a while, your fund may not be a good fit. It's best to check.

Protecting wealth

- ✓ For those larger unexpected things that emergency savings can't handle, insurance keeps you covered.
- ✓ Cover your people, your money, and your stuff in case the unexpected happens. That's what insurance is for.
- ✓ Review your insurance each year, especially when your situation changes. Check in with your cover.
- ✓ Scams are everywhere, so stay super careful about what you click.
- ✓ If someone approaches you out of the blue, that's a red flag for it being a scam.

How to get involved

Get thinking

- ✓ Think about what initiatives could help your clients and whānau to pause and get sorted.
- ✓ What is the best way to reach your audience? Is it in person, online, or through the community?
- ✓ Think about whether it would be useful to focus on 'Pause. Get sorted.' overall, or smaller 'bite size' subjects like KiwiSaver, debt, saving or investing.
- ✓ Download the Sorted Money Month assets - we have posters, social posts and more available that can be customised for your event.
- ✓ Join our workshop webinar in June to hear more.

Plan your activity

- ✓ Organise your activity –whether it's events, stalls, speakers, webinars, quizzes, or blogs so they are ready to go.
- ✓ If you're a not-for-profit partner wanting help to bring your idea to life, apply for a share of the [Money Month community fund](#). A shared pool of up to \$10,000 will be available in 2024. \$5,000 of this is dedicated to initiatives supporting the financial wellbeing of women thanks to Empower Women.
- ✓ Start to build momentum by promoting your event – think notice boards, social media, newsletters, email, or letting your local media know.
- ✓ [Share your event or activity plans](#) with us so we can promote them on the Sorted event calendar.

Get the word out

If you are running an event:

- ✓ Take photos
- ✓ Let us know so we can promote it to New Zealanders on our Sorted event calendar.

If you are promoting content online:

- ✓ Use the Money Month logo
- ✓ Use the official hashtag: #SortedMoneyMonth
- ✓ Tag Sorted on social media so we can share it

Activity ideas

Use giveaways

- ✓ Run a prize draw.
- ✓ Set up a kai and kōrero stall in your community – offering a free sausage sizzle, soup, or baked goods really helps to start the conversation.
- ✓ Share food bags with cheap recipes and ingredients in your community.

Host a webinar

- ✓ Hold a free webinar online on a money topic.
- ✓ Run a Q&A session with a guest speaker or panel.
- ✓ Could be on a topic such as: investing, saving, debt management, insurance etc.
- ✓ Or to support life events such as buying a house, having a baby, moving out of home.

Run a workshop

- ✓ Run a workshop in your community.
- ✓ Topics could include cooking on a budget, planting a vege garden, saving money on power, or mortgage advice and tips.

Leverage digital channels and the media

- ✓ Run a Facebook or Instagram Live event with your customers.
- ✓ Create a money quiz or get your community together to try Sorted's [Money Personality Quiz](#).
- ✓ Encourage your followers to share their best money tip.
- ✓ Join your local radio station – a giveaway might help.

Partner up

- ✓ Reach out to local businesses such as supermarkets or banks to create joint activities or events.
- ✓ Run an event/workshop with your local school or church.
- ✓ If you're a not-for-profit partner, apply for support through the [Money Month community fund](#) (applications close 10 June).

Create a social media campaign

We encourage you to leverage your social media platforms to encourage New Zealanders to Pause. Get sorted.

As well as to promote your own event, or other events happening across the month that you think your audience will be interested in, you could:

Facebook:

- ✓ Host a Facebook Live event where you can present directly to your audience.
- ✓ Utilise your existing content by sharing a post that aligns to the **#SortedMoneyMonth** theme.
- ✓ Use Facebook Events to share any events you'll be hosting during Sorted Money Month.
- ✓ Share posts from **@sorted.org.nz** and other stakeholders participating in Sorted Money Month on your social channels.

Instagram:

- ✓ Make use of the official hashtag **#SortedMoneyMonth** and tag us **@live_sorted**
- ✓ Pick different topics throughout the month (pulling from our topics or come up with your own) and feature posts on your Instagram – these could be feed images, Reels or Instagram Stories.
- ✓ Make use of the interactive stickers in Instagram Stories, like quizzes, polls and Q&A to engage your audience.
- ✓ Host an Instagram Live broadcast where you can present directly to your audience.

TikTok:

- ✓ Leverage your Instagram Reels by also posting them on TikTok, especially if you want to target a younger audience.
- ✓ Create a video with money tips that could be relevant to your audience.
- ✓ Make use of the official hashtag **#SortedMoneyMonth** and tag us **@sorted.org.nz**.

Tag Sorted:

Remember if you tag **#SortedMoneyMonth** we can reshare your content on our channels. Use our dedicated resources or create your own, and tell us your plans for Money Month socials and we can watch out for your content. Email us at natasha@retirement.govt.nz

 **@live_sorted**

 **sorted.org.nz**

 **sorted.org.nz**

 **Te Ara Ahunga Ora Retirement Commission**

TIP:

There are 26 money tips available in the resources section for you to post.



Campaign assets

You can download all the Money Month assets [here](#).

Campaign logos – Sorted Money Month

Below are six versions of the Sorted Money Month logo for you to use on your own campaign. These allow for different formats and if you are using them on a coloured background or white. We do not have rules on which one you need to use where, just ask that these are reproduced in their entirety and without alteration.

The logo consists of the word "sorted" in a small, orange, sans-serif font, positioned above the words "Money Month" in a larger, dark purple, serif font.The logo consists of the word "sorted" in a small, orange, sans-serif font, positioned above the words "Money Month" in a larger, dark purple, serif font.The logo consists of the word "sorted" in a small, orange, sans-serif font, positioned above the words "Money Month" in a larger, white, serif font, all set against a grey background.The logo consists of the word "sorted" in a small, orange, sans-serif font, positioned above the words "Money Month" in a larger, white, serif font, all set against a grey background.The logo consists of the word "sorted" in a small, orange, sans-serif font, positioned above the words "Money Month" in a larger, white, serif font, all set against a grey background.The logo consists of the word "sorted" in a small, orange, sans-serif font, positioned above the words "Money Month" in a larger, white, serif font, all set against a grey background.

Campaign logos – Pause. Get sorted.

Below are seven versions of the 'Pause. Get sorted.' logo for you to use on your own campaign. We do not have rules on which one you need to use where, just ask that these are reproduced in their entirety and without alteration.



⏸ Pause. Get sorted.

⏸ Pause. Get sorted.



⏸ Pause. Get sorted.



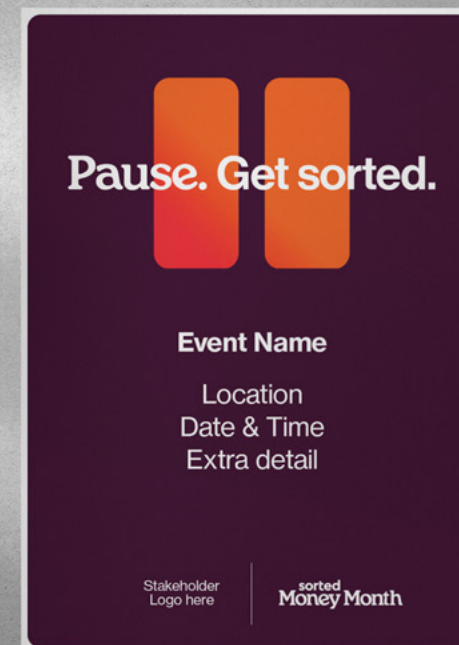
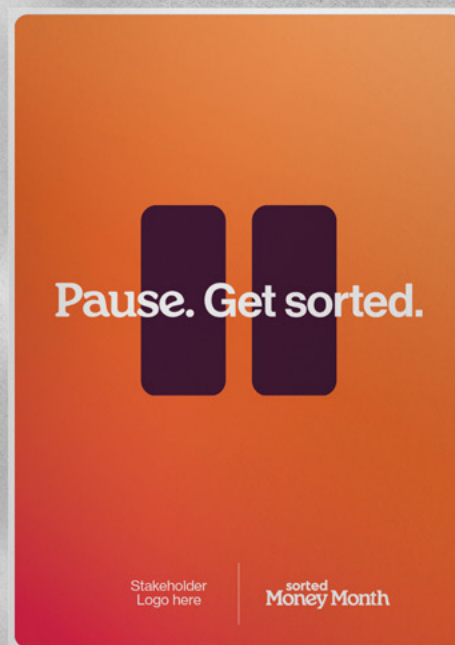
⏸ Pause. Get sorted.

Campaign posters

We have designed a range of posters that you can use to promote Money Month and your involvement.

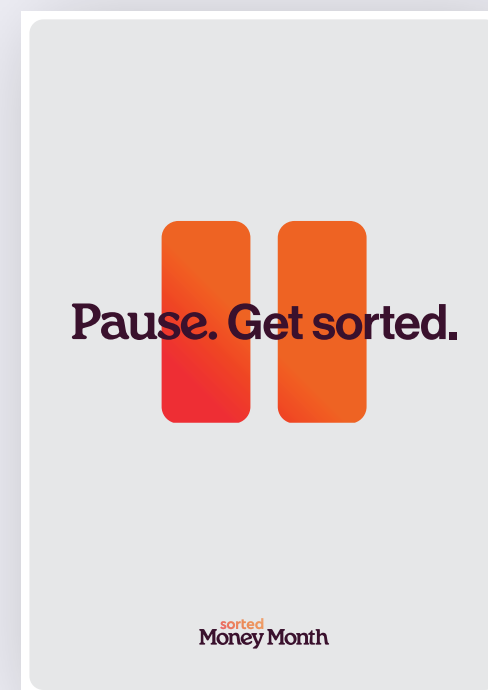
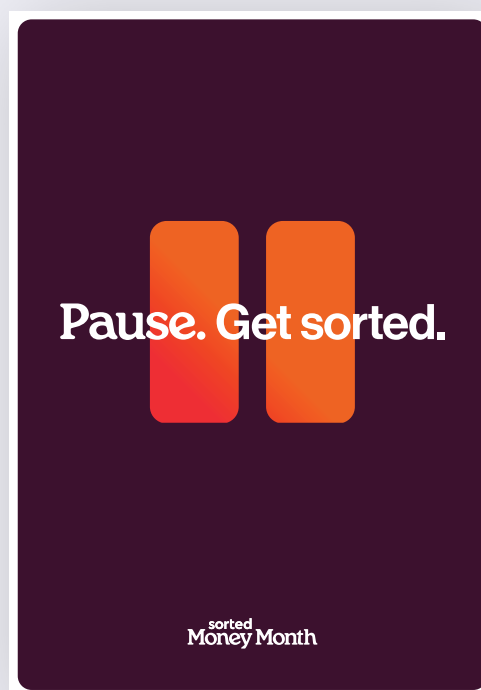
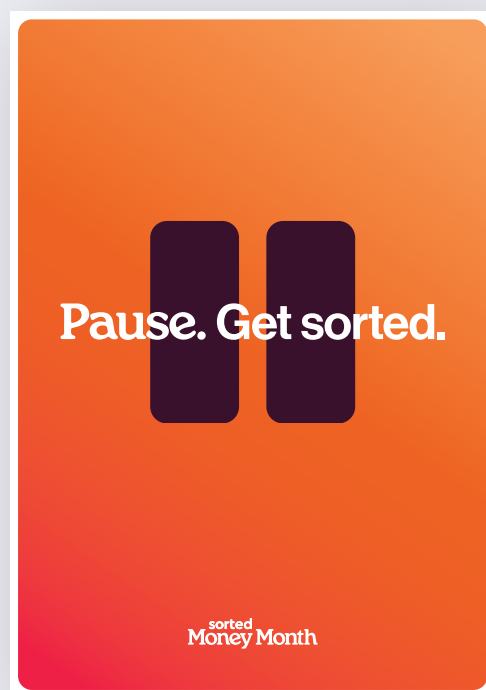
From reminders for people to 'Pause. Get sorted.' through to posters that you can customise with your own Money Month Event information, or money tips that you think will help people to get sorted.

The posters can be dual branded and printed in any size you like.



Campaign posters

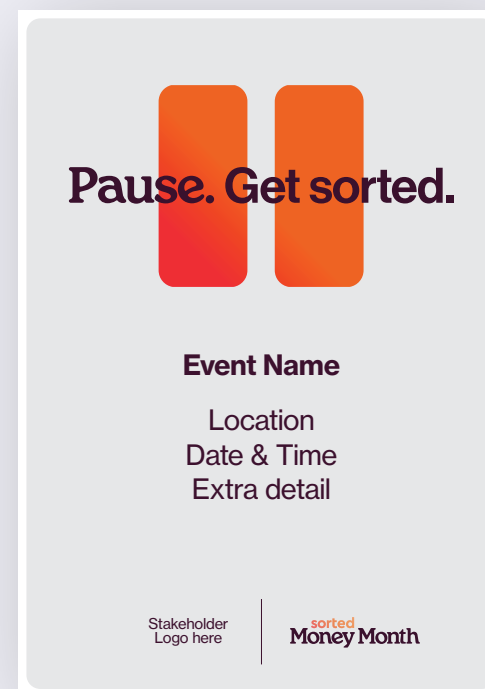
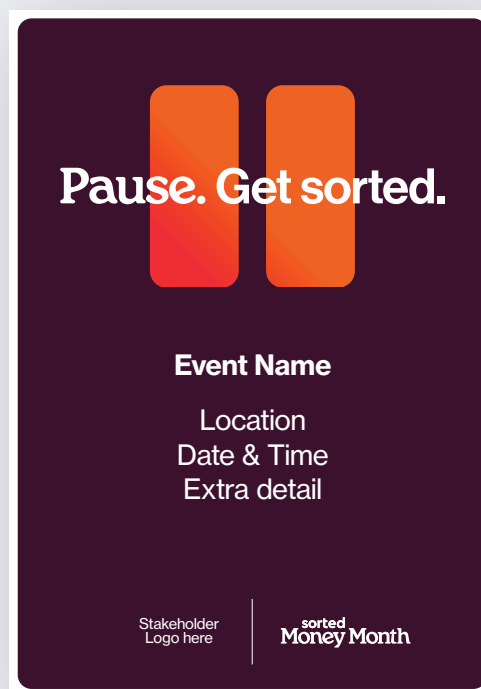
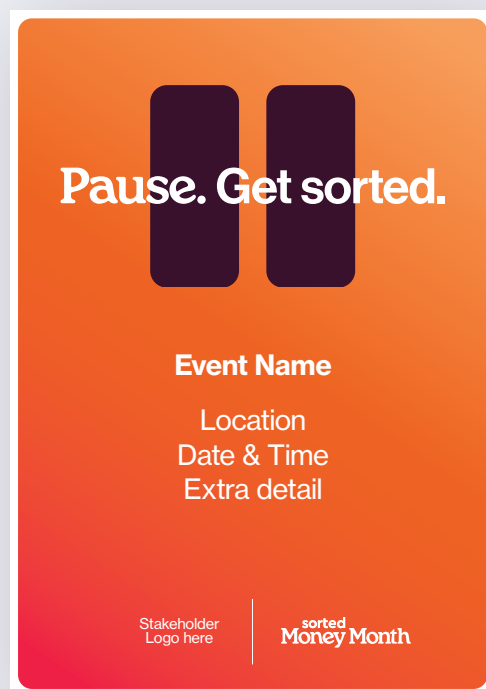
Below are three versions of the campaign posters. These can be printed out in colour or black and white, at A4 or A3 and are great to get awareness of the campaign out there. We also have three versions which you can add your own logo to so it's dual branded.



Customisable event posters

Below are three versions of our customisable event posters / flyers. These can also be printed out in colour or black and white, at A4 or A3 if you want to use them as posters on the wall or print smaller at A5 and hand them out as flyers to promote your events.

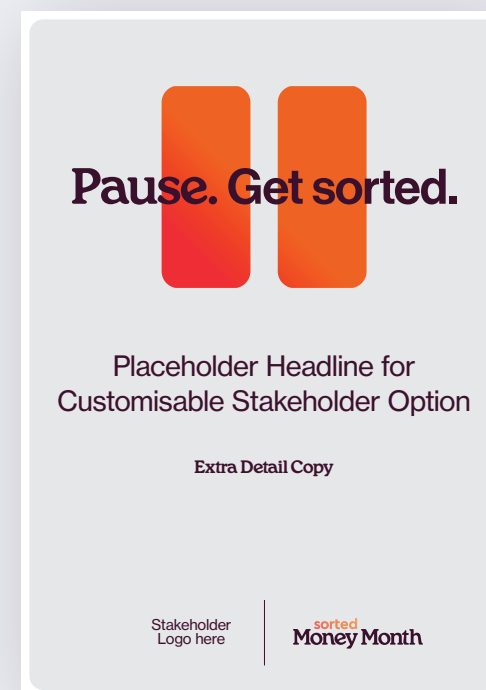
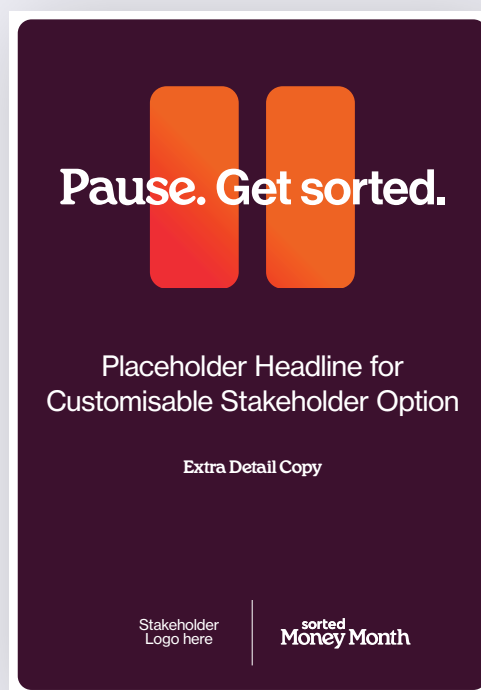
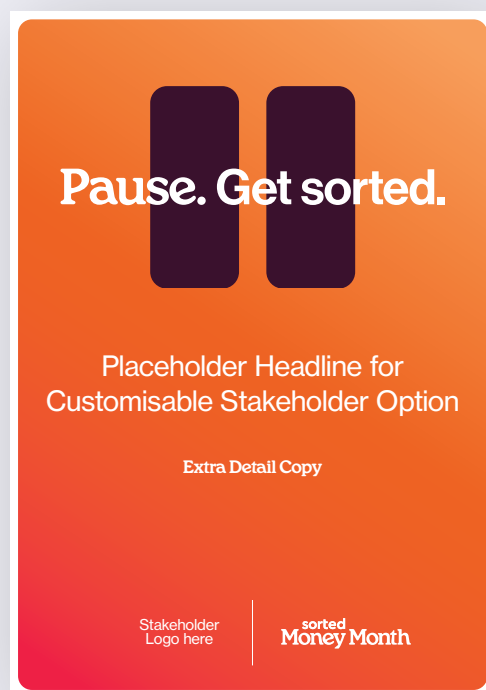
See page 39 for detailed instructions on how to add your details to our poster and social assets.



Customisable message posters

Below are three versions of our customisable posters that you can use to promote your own Money Month message. This format is great to customise with your own money tips for your audience. Don't forget to add your own logo as well.

See page 39 for detailed instructions on how to add your details to our poster and social assets.



Social media resources

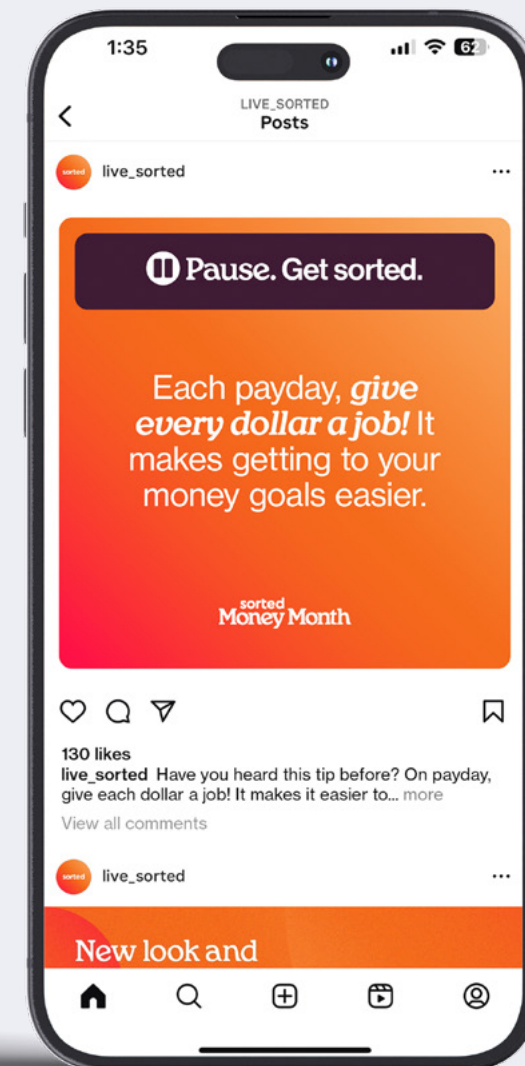
We have provided templates and resources for you to use on your social accounts like Facebook and Instagram.

For your feed posts we have 1080x1080 formats available and for your Instagram Stories we have 1080x1920.

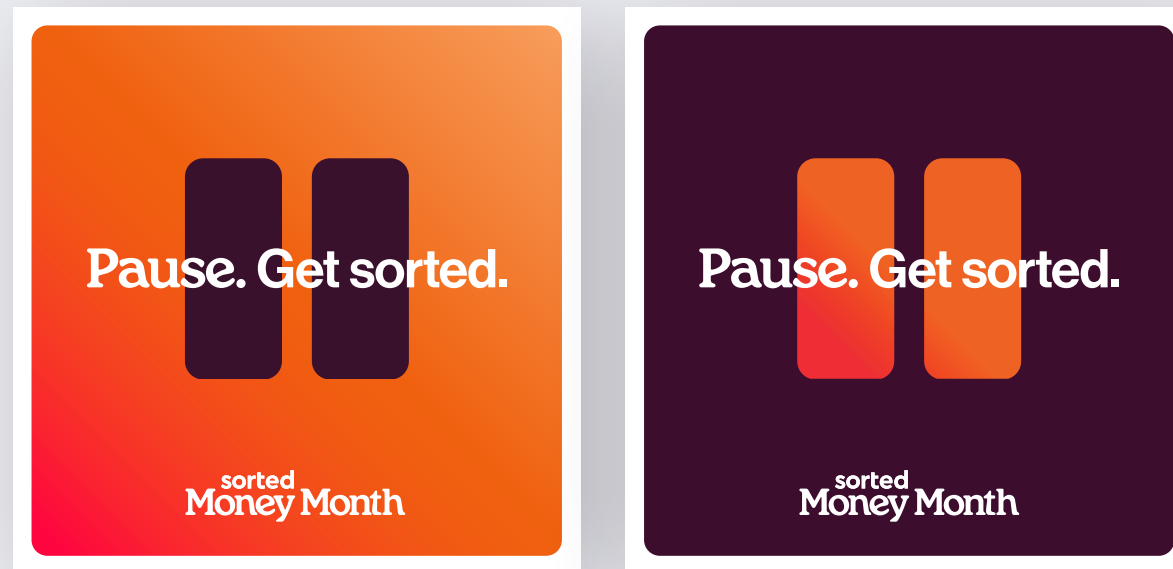
These assets include campaign messages, as well as a selection of tips for each of our key themes:

- ✓ Everyday money x 4
- ✓ Debt x 4
- ✓ KiwiSaver x 5
- ✓ Investing x 4
- ✓ Saving x 4
- ✓ Protecting wealth x 5

We have also provided a blank template so you can write your own money tips as well as a customised event tile for you to promote your Sorted Money Month events.



Social – Money Month campaign



Social – Everyday money tips

⏸ Pause. Get sorted.

A good budget means you're **constantly improving** your money situation.

sorted
Money Month

⏸ Pause. Get sorted.

Sorting your **money** *doesn't just take care of you* – it helps meet the future needs of your whānau.

sorted
Money Month

⏸ Pause. Get sorted.

Build your budget to plan your spending and saving, making sure **you're always earning more** than you're spending.

sorted
Money Month

⏸ Pause. Get sorted.

Each payday, **give every dollar a job!** It makes getting to your money goals easier.

sorted
Money Month

Social – Investing tips

⏸ Pause. Get sorted.

Invest to **supercharge your savings** (like in KiwiSaver). The money you put in grows from compound interest.

sorted
Money Month

⏸ Pause. Get sorted.

By taking a calculated risk investing – you can reap rewards and **grow your money** for your future.

sorted
Money Month

⏸ Pause. Get sorted.

Pooling your money in a fund with other investors helps you **spread your risk** (without your eggs all in one basket).

sorted
Money Month

⏸ Pause. Get sorted.

Over time, you can get great results by investing and **reach your goals in life.**

sorted
Money Month

Social – KiwiSaver tips

⏸ Pause. Get sorted.

KiwiSaver's a **team effort!**
Government and employers
contribute to your savings
too, and all that money
gets invested.

sorted
Money Month

⏸ Pause. Get sorted.

Find the **right type of
KiwiSaver fund** for you.
The difference on average
between conservative and
growth could be \$130,000!

sorted
Money Month

⏸ Pause. Get sorted.

Contribute at least \$20
weekly to your KiwiSaver –
the **government will put
in \$521 every year.**

sorted
Money Month

⏸ Pause. Get sorted.

Even if you've been in
KiwiSaver for a while, your
fund may **not be a good fit.**
It's best to check.

sorted
Money Month

⏸ Pause. Get sorted.

**Not all KiwiSaver
funds are the same!**
Weigh up the fees, how
helpful the provider is,
and check past results.

sorted
Money Month

Social – Debt tips

⏸ Pause. Get sorted.

Debt doesn't need to be daunting. Having a plan to pay for it puts ***you in control.***

sorted
Money Month

⏸ Pause. Get sorted.

Shed your debt – especially the high-interest stuff – to really ***improve your money situation.***

sorted
Money Month

⏸ Pause. Get sorted.

Tackling high-interest debts first is the quickest way out. Pay off your priciest debts to ***get debt free faster.***

sorted
Money Month

⏸ Pause. Get sorted.

Kick off little things to get the ball rolling – ***paying smaller debts first*** can boost your motivation.

sorted
Money Month

Social – Saving tips

⏸ Pause. Get sorted.

Saving money isn't just for nice things, it's for emergencies – a **safety net for anything unexpected.**

sorted
Money Month

⏸ Pause. Get sorted.

More saving gives you **more options.** Even small amounts build up over time.

sorted
Money Month

⏸ Pause. Get sorted.

Planning a purchase? Sleep on it, chat about it, wait a few days. Time will tell you **if you really need it.**

sorted
Money Month

⏸ Pause. Get sorted.

Automate everything. Auto-payments for your savings, investing and bills means **less to think about.**

sorted
Money Month

Social – Protecting wealth tips

⏸ Pause. Get sorted.

For those larger unexpected things that emergency savings can't handle, **insurance keeps you covered.**

sorted
Money Month

⏸ Pause. Get sorted.

Cover your people, your money, and your stuff in case the **unexpected happens.** That's what insurance is for.

sorted
Money Month

⏸ Pause. Get sorted.

Review your insurance each year, especially when your situation changes. Check in with your cover.

sorted
Money Month

⏸ Pause. Get sorted.

Scams are everywhere, so **stay super careful** about what you click.

sorted
Money Month

⏸ Pause. Get sorted.

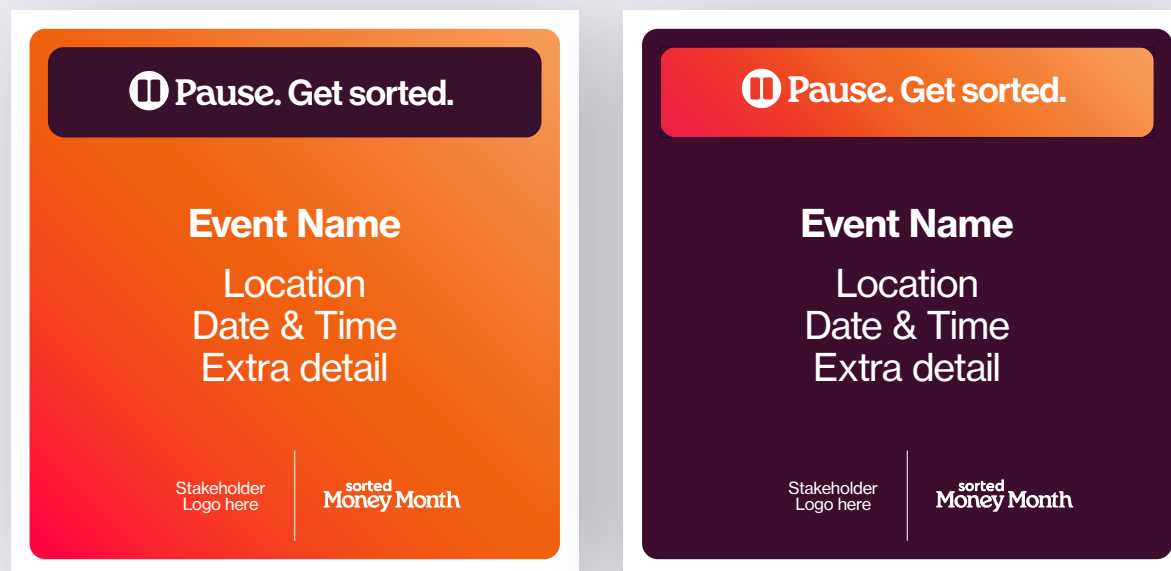
If someone approaches you out of the blue, that's a **red flag for it being a scam.**

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Money Month

Social - Customisable event assets

Below are two versions of our customisable event social tiles which you can use to promote your own Money Month event.

See page 39 for detailed instructions on how to add your details to our poster and social assets.



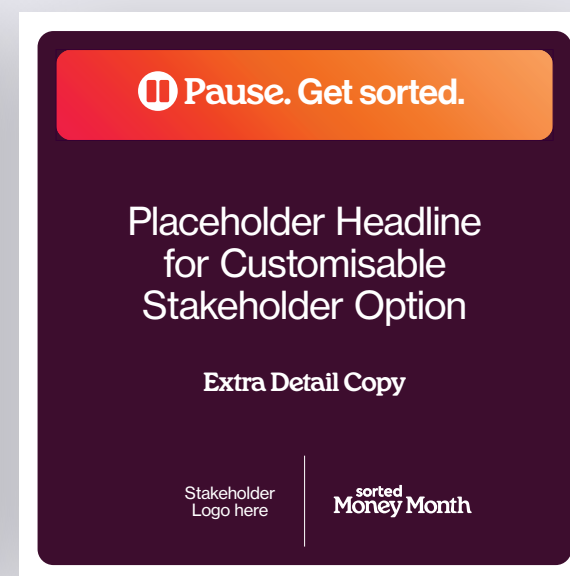
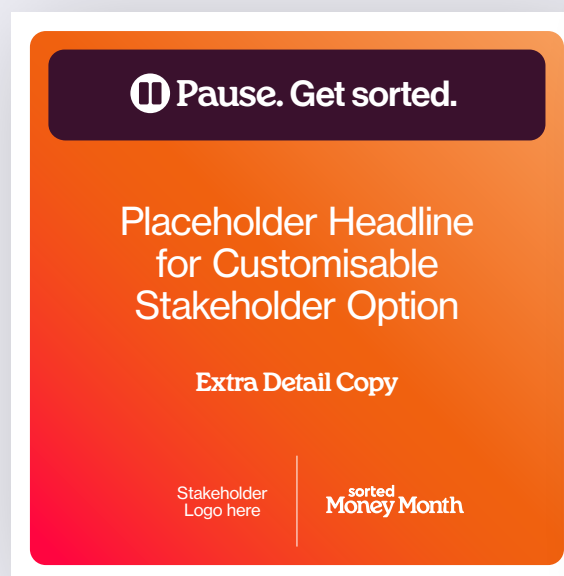
Social - Customisable tip assets

Below are two versions of our customisable tiles that you can use to promote your own Money Month message. This format is great to customise your own money tips for your audience.

See page 39 for detailed instructions on how to add your details to our poster and social assets.

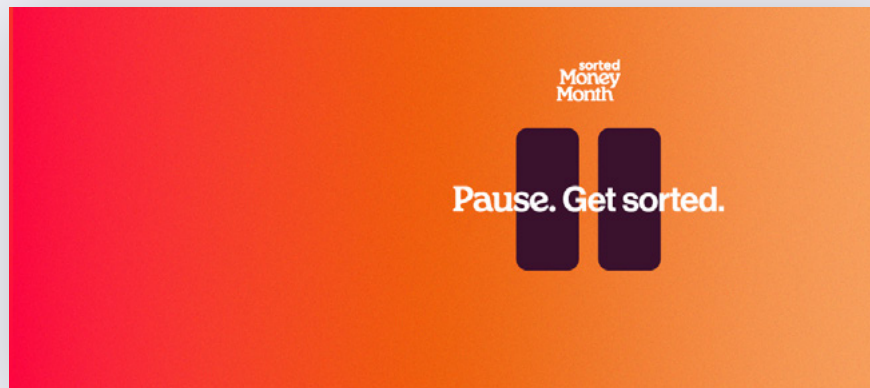
Customise with your info

- ✓ Add your own heading
- ✓ Add your own message, like a money tip or how your organisation can help people to get sorted
- ✓ Add your logo

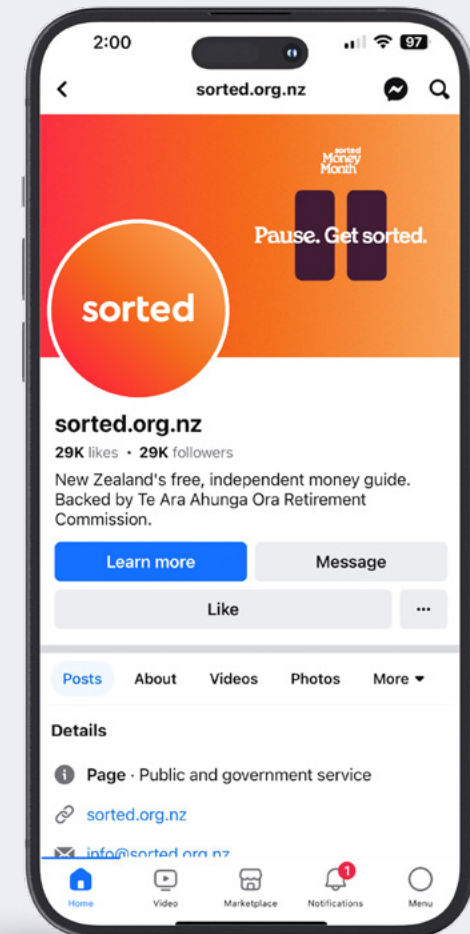
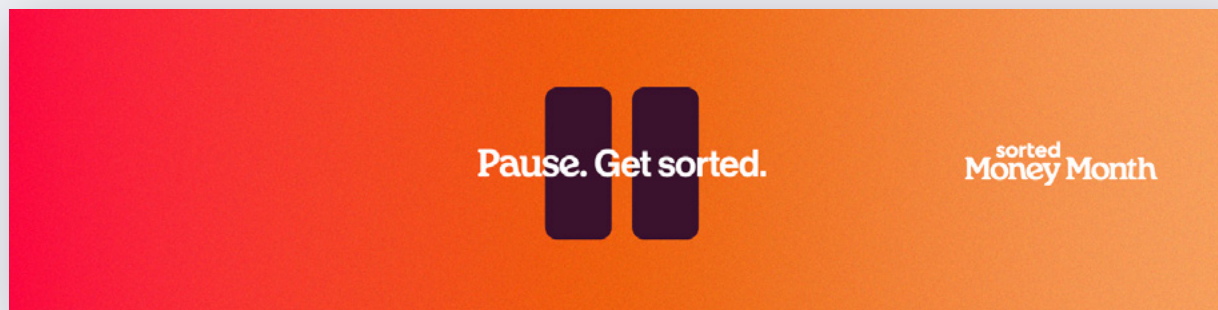


Social - Cover images

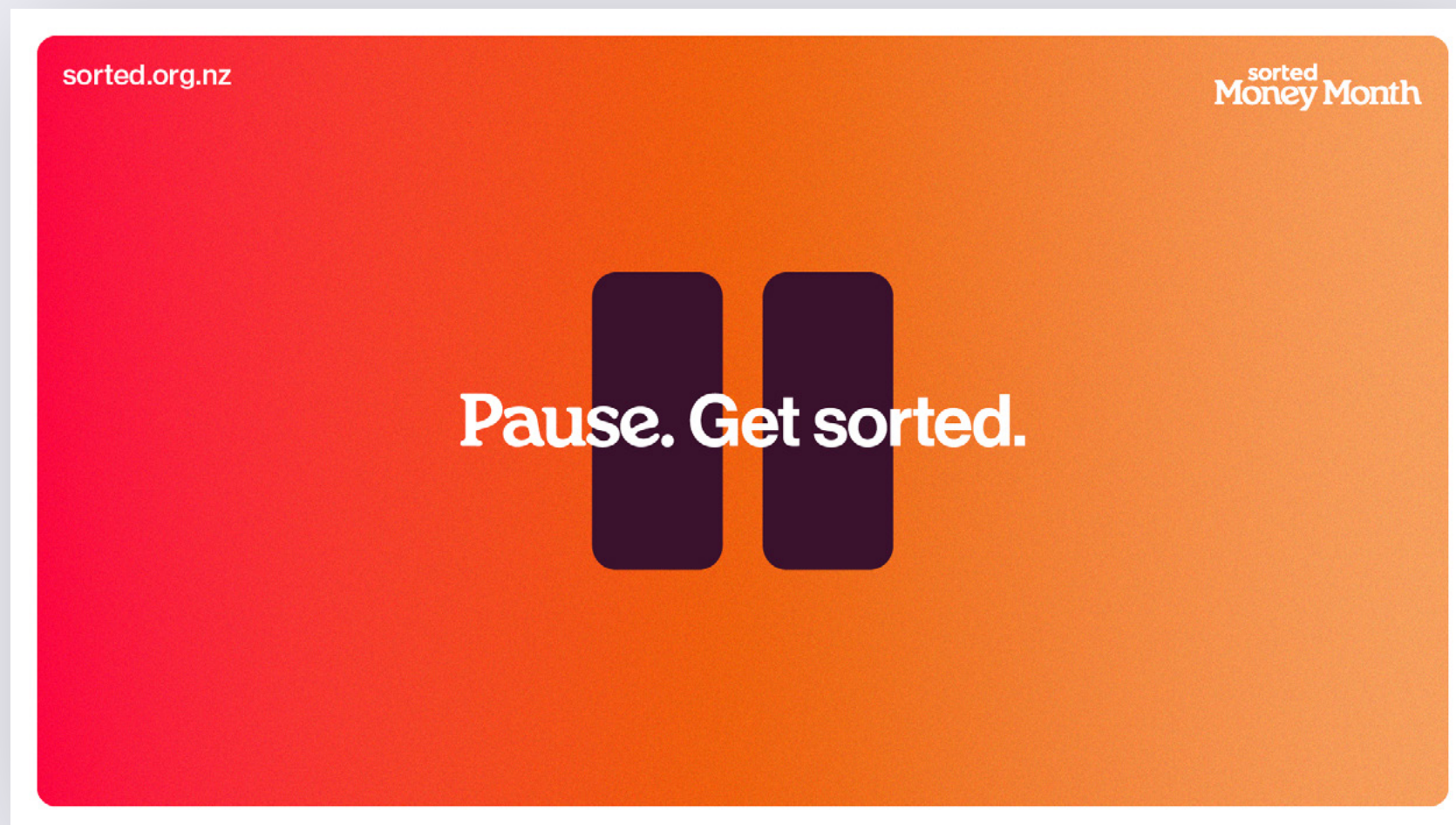
Facebook cover image



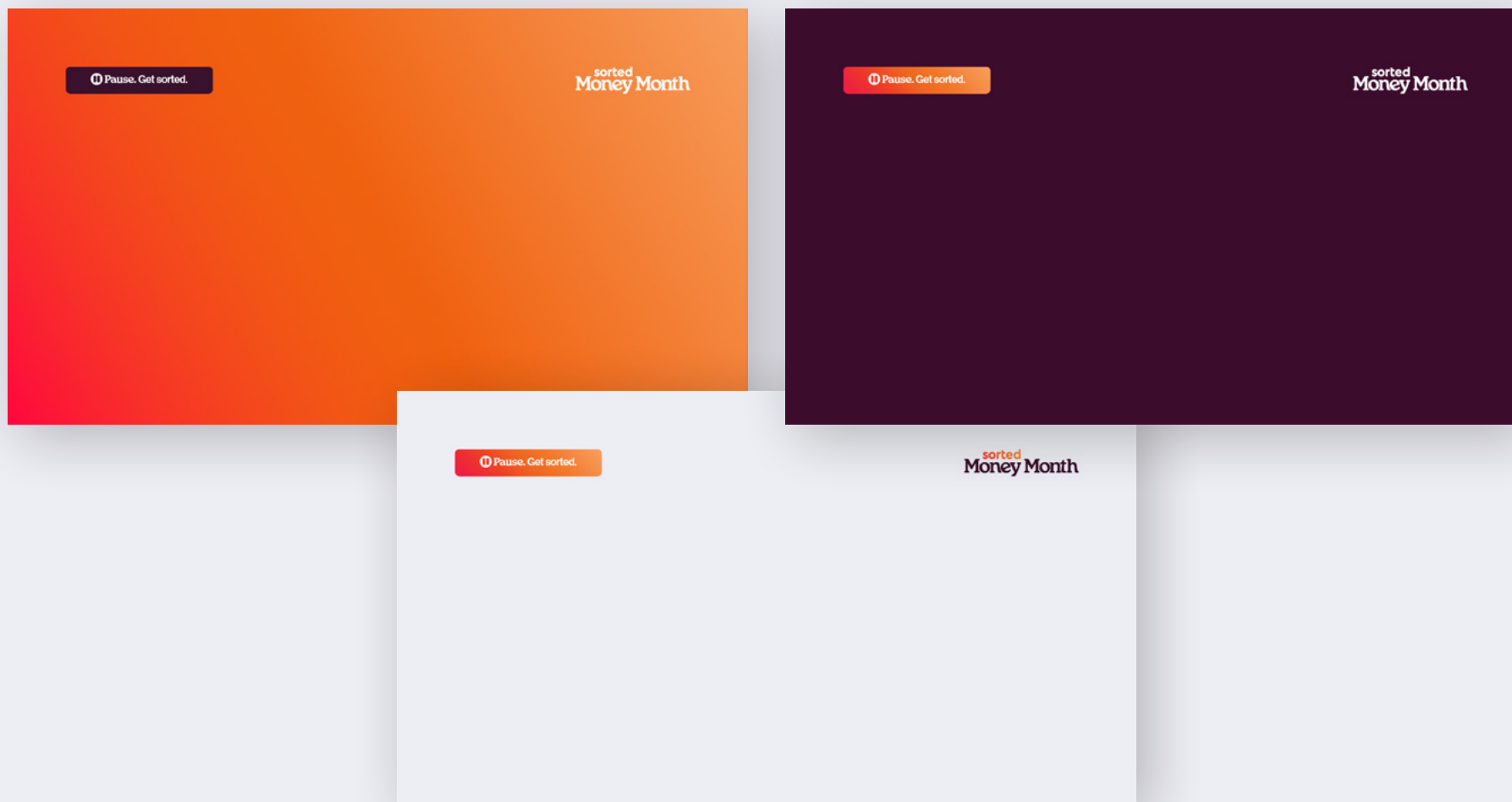
LinkedIn cover image



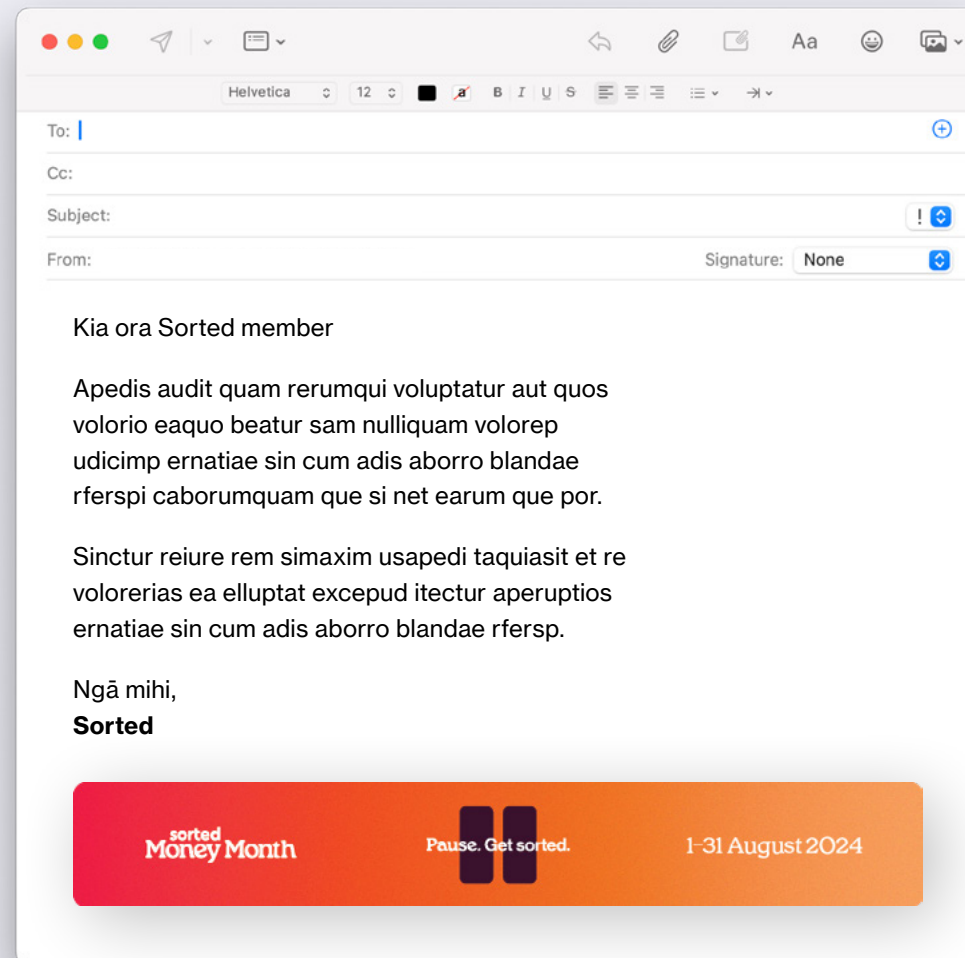
AV screens



Zoom backgrounds



Email footer



Logos and tips available in te reo Māori

We have also created all of the Money Month tip assets in te reo Māori, as well as the translated logo: Kia – tū! Kia rite!



Kia tū! Kia rite!

Kia tū! Kia rite!

Kia tū! Kia rite!

Kia tū! Kia rite!

Kia tū! Kia rite!

Kia tū! Kia rite!

Kia tū! Kia rite!

Te reo Māori campaign posters

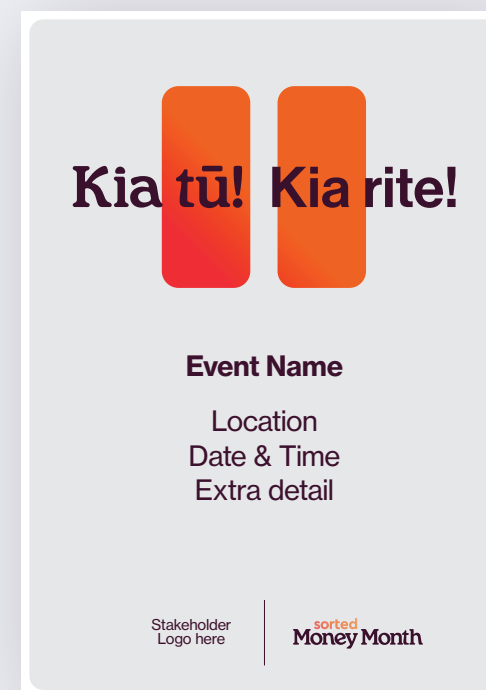
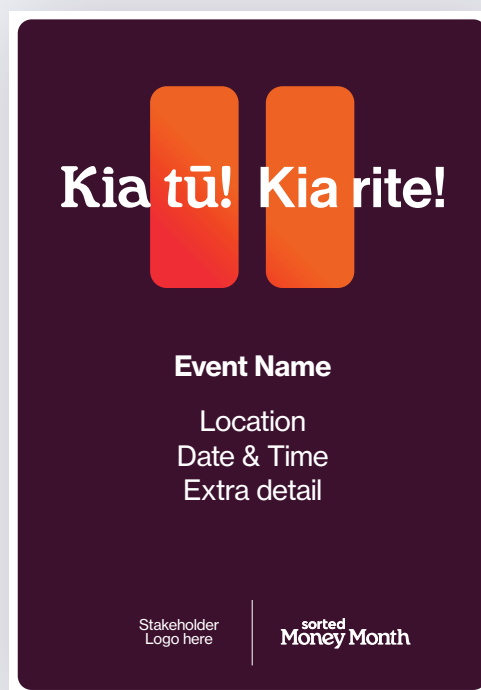
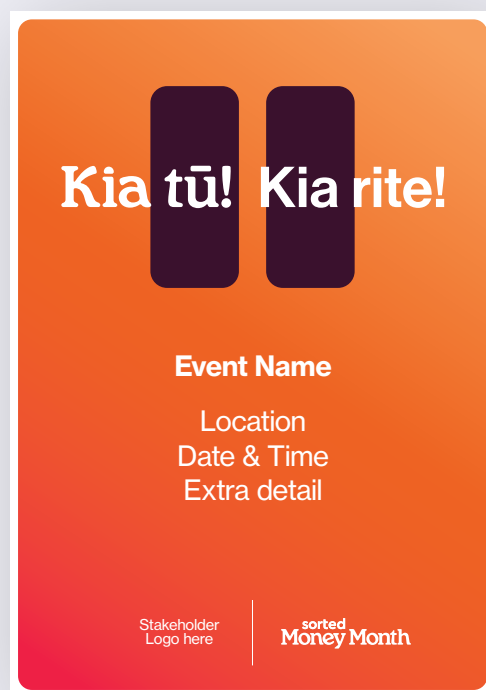
Below are three versions of the campaign posters. These can be printed out in colour or black and white, at A4 or A3 and are great to get awareness of the campaign out there. We also have three versions which you can add your own logo to so it's dual branded.



Te reo Māori event posters

Below are three versions of our customisable event posters / flyers. These can also be printed out in colour or black and white, at A4 or A3 if you want to use them as posters on the wall or print smaller at A5 and hand them out as flyers to promote your events.

See page 39 for detailed instructions on how to add your details to our poster and social assets.



Te reo Māori message posters

Below are three versions of our customisable posters that you can use to promote your own Money Month message. This format is great to customise with your own money tips for your audience. Don't forget to add your own logo as well.

See page 39 for detailed instructions on how to add your details to our poster and social assets.



Content checklist

To help your activity reach as many people as possible,
make it sharable and include:

- ✓ The Sorted Money Month logo
- ✓ Official hashtags: **#SortedMoneyMonth**
- ✓ Tag Sorted on social media
- ✓ Reference the campaign theme **'Pause. Get sorted.'**
- ✓ Reference the dates 1-31 August 2024
- ✓ Link to the campaign webpage **sorted.org.nz**
- ✓ Share your event on the Sorted event calendar



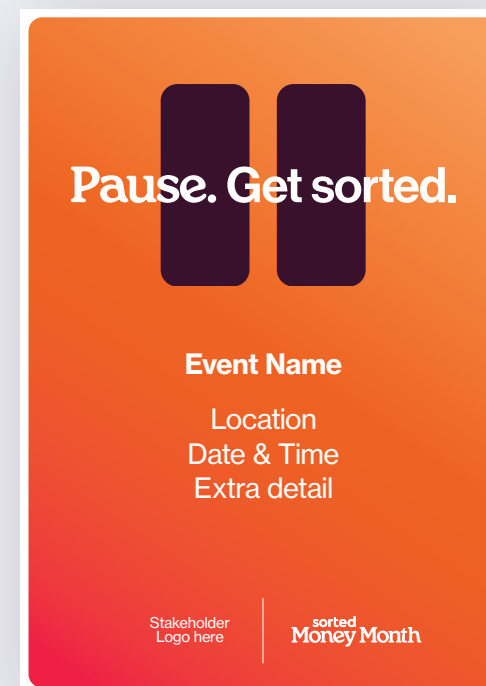
How to customise your poster or social assets

It's great you want to use our poster or social templates and make them your own. You can add your logo, update with your event details, or come up with a money tip of your own.

To allow for you to customise, all assets are provided in a PDF format and on the following pages you can learn how to update the text and add your logo. If you have any trouble at all, please email natasha@retirement.govt.nz.

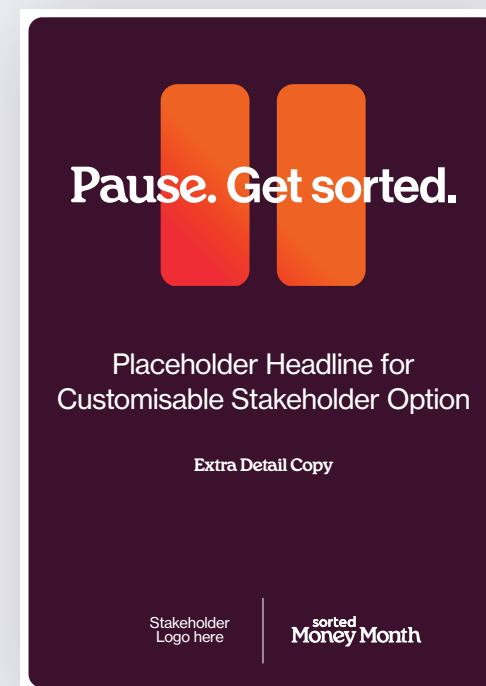
Changing text in a PDF

1. **Open Adobe Acrobat:** Launch Adobe Acrobat on your computer.
2. **Open the PDF Document:** Click on “File” in the menu bar and select “Open” to browse and select the PDF document you want to edit. Alternatively, you can drag and drop the PDF file into the Acrobat window.
3. **Access the Tools Panel:** On the right side of the Acrobat window, click on the “Tools” panel to open the tools panel.
4. **Choose the Edit PDF Tool:** In the tools panel, locate and select the “Edit PDF” tool. It is represented by a pencil icon.
5. **Select the Text to Edit:** With the “Edit PDF” tool active, click on the text in the PDF document that you want to edit. The text will become highlighted, or a bounding box will surround it.
6. **Edit the Text:** Once the text is selected, you can start editing it.
7. **Format the Text:** If you want to change the font, size, colour, or other formatting options of the edited text, select the edited text again and look for the formatting options in the “Format” panel on the right side of the window.
8. **Move or Resize the Text Box (Optional):** If you need to move or resize the text box containing the edited text, hover your cursor over the edges or corners of the bounding box until you see a double-headed arrow. Click and drag to reposition the text box or resize it as needed.
9. **Save the Changes:** To save the edited PDF document, click on “File” in the menu bar and select “Save” or “Save As” to save the modified PDF document with your edits.



Adding your logo in a PDF

1. **Open Adobe Acrobat:** Launch Adobe Acrobat on your computer.
2. **Open the PDF file:** Click on “File” in the menu bar and select “Open.” Locate and select the Sorted Customisable PDF file that you want to edit.
3. **Access the Edit tool:** In the right-hand panel, click on the “Edit PDF” tool. This will enable the editing features of Adobe Acrobat.
4. **Select the logo area:** Click on the placeholder logo text. Once selected, delete the placeholder. Click and select that area again. If necessary, you can adjust the size of the area by dragging the corners.
5. **Insert your logo:** After selecting the area, rightclick within the selection and choose “Add Image.” A file browser window will appear.
6. **Locate your logo file:** Browse your computer to find the image file of your logo. Select the file. Your logo will now be inserted into the selected area.
7. **Adjust the logo position and size:** If needed, you can resize and reposition the logo. Click on the logo to display resizing handles, then click and drag the handles to adjust the size. To move the logo, click and drag it to the desired location within the selected area.
8. **Save the Changes:** To save the edited PDF document, click on “File” in the menu bar and select “Save” or “Save As” to save the modified PDF document with your edits.



Contact us

If you have any questions about getting involved with Sorted Money Month, please reach out to us.

We're happy to help, please email natasha@retirement.govt.nz.