

MERITXELL G.FARRÉ

Brand Strategy & Identity Development

FOR A YOUTUBE CREATOR



Presented to
Personal Finance Creator

Presented by
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A Brand Built for Human Connection, Cultural Sensitivity, and Personal Financial Empowerment

Money is intimate. It is shaped by childhood memories, cultural stories, mistakes we don't admit out loud, and hopes we don't always know how to articulate. When I partnered with a personal finance creator with a multicultural background and a six-figure professional journey, the challenge was not simply to design a brand – it was to design a *safe space*.

A space where:

- money could be spoken about without shame
- financial literacy felt accessible rather than elitist
- cultural differences were acknowledged, not ignored
- humour and realism could coexist
- people of all income levels felt seen

This case study narrates how I transformed raw experience and ambition into a **coherent, emotionally intelligent, culturally attuned brand** ready for global scale.

Brand Foundations: Understanding the Emotional Landscap



Branding a personal finance creator is not just positioning – it's psychology. From the original research, several emotional tensions emerged:

Emotional Tension Map

This became the emotional blueprint of the brand.

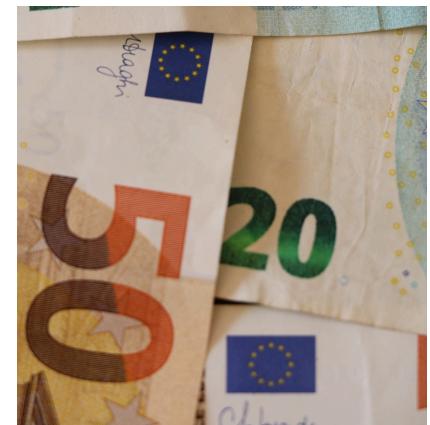
Audience Tension	Description	Brand Opportunity
Fear of Judgement	People feel embarrassed about what they don't know.	Create a shame-free, open learning environment.
Cultural Money Taboos	Some cultures avoid discussing wealth altogether.	Build a brand rooted in sensitivity and normalisation.
Overwhelm from Complexity	Financial content is intimidating	Prioritise clarity and break down complexity without condescension.
Aspiration vs Reality	Prioritise clarity and break down complexity without condescension.	Deliver practical steps and relatable storytelling.
Desire for Trust	The niche is filled with hype and “quick fixes”.	Position the creator as authentic, experienced, realistic.



The Insight That Changed Everything

Through the research, pivotal truth emerged:
Financial literacy is not universal – it is cultural.

1. In some cultures, wealth is openly discussed.
2. In others, silence is the norm.
3. In some, risk-taking is rewarded.
4. In others, caution is moralised.



By recognising this, the brand could shift from **generic financial advice to culturally-aware emotional guidance** – something extremely rare in the niche.

This became our north star:

“Money is personal. Finance is cultural. Learning should be human.”

Defining the Brand Identity

The creator's story offered compelling raw material:

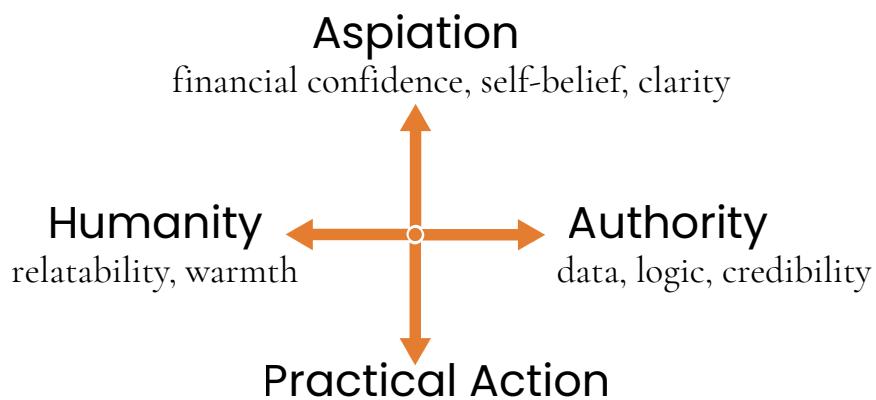
- Lived in 6 countries across 3 continents
- Rose from €0 income to six figures *twice*
- Experienced financial hardship during Covid
- Holds an engineering degree and an MBA

- Worked as a Senior Growth Manager
- Grew up in a lower-middle-class Indian household where money was tight but wisely managed

This informed a brand identity that blends:

- **rigorous thinking**
- **emotional intelligence**
- **cultural empathy**
- **practicality**

Brand Identity Triangle



The brand sits *in the centre* – human, warm, credible, and actionable.

Brand Values, Voice & Tone

Core Brand Values

Project and Initiative	Value
No exaggerated promises, no shortcuts.	Honesty
Advice grounded in life experience, not theory.	Realism
Transparent storytelling and financial vulnerability.	Trust
Breaking down complexity without losing nuance.	Clarity
Recognising cultural upbringing and emotions.	Empathy

Voice & Tone: The Personality of the Brand

The channel's voice is a blend of:

- maturity
- warmth
- insightful wit
- global awareness
- approachable intelligence

This tone stands apart from two extremes commonly found in the niche:

Typical Finance Channel Tone: “Hype, urgency, get rich now”

Our Brand Tone:

Calm, grounded, trustworthy

Typical Finance Channel Tone: “Dry Technical Lectures”

Our Brand Tone:

Conversational, clear, emotionally intelligent

Typical Finance Channel Tone: “Judgemental or preachy”

Our Brand Tone:

Empathetic, non-judgemental, empowering

Visual Identity System

5.1 Colour System (Triadic Palette)

Colour	Hex	Meaning
Clear Black	#2D2E2C	Stability, clarity, neutrality
Musky White	#E5E6E1	Simplicity, freshness, calm
Teal	#008080	Maturity, balance, sophistication
Olive Green	#808000	Financial grounding, organic growth
Patriarch Purple	#800080	Depth, individuality, quiet luxury

This palette avoids the typical neon greens or aggressive reds of finance branding.

Instead, it conveys **subtle confidence and modern maturity**.

5.2 Typography

- **San Francisco** – UI-friendly modernity
- **Futura** – visually striking, ideal for thumbnails
- **Tenor Sans** – editorial sophistication

Together: a blend of **approachable design and premium finish**.

5.3 Imagery & Aesthetics

The brand visual direction is:

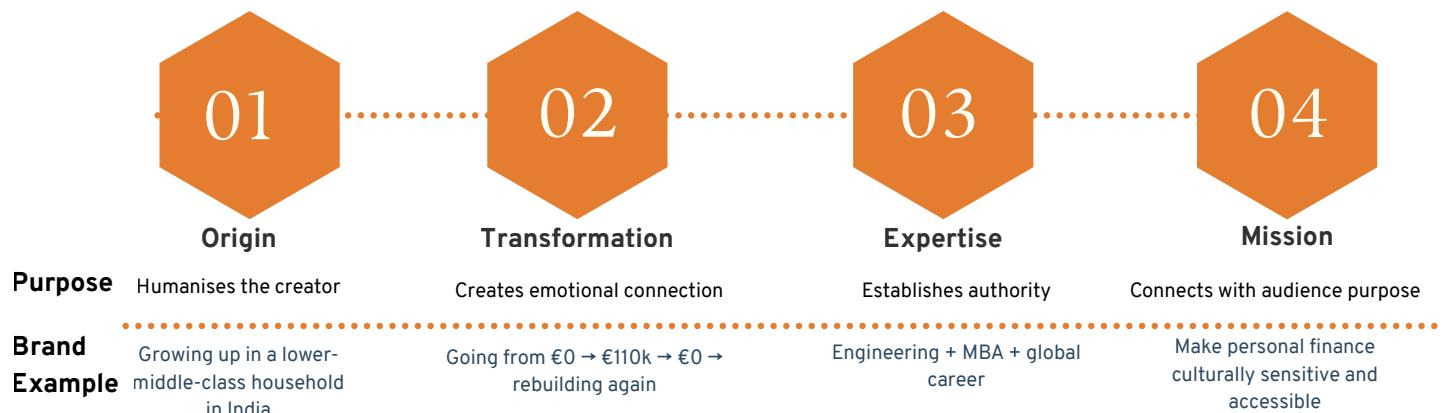
- minimalistic

- high-contrast
- rooted in clean lines
- calm, uncluttered compositions

This positions the brand as a *premium educator*, not a noisy entertainer.

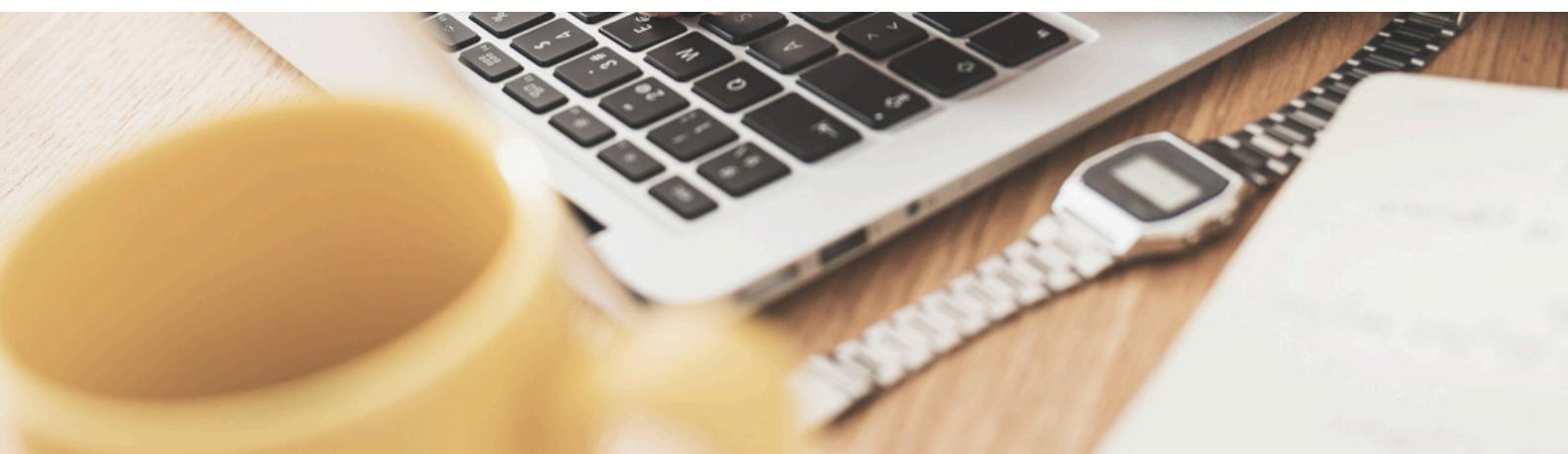
The Brand Story Framework

To help the creator tell his story consistently, I developed a modular narrative structure.



This framework is used in:

- channel descriptions
- intro videos
- interviews
- website copy
- social bios



Brand Naming: Neuromarketing Approach

Naming Criteria Table

Criterion	Why It Matters	Outcome
Memorability	Needed for recall in a crowded niche	Shortlist of names with strong rhythm
Emotional Resonance	Finance content requires trust	Names tested for warmth & familiarity
Cross-Cultural Neutrality	Global audience	Avoided idioms tied to one culture
Visual Harmony	Logo design adaptability	Chosen name works with long & short formats
Subconscious Trust Triggers	Based on Berger & Milkman's research	Selected name reflects stability and human tone

The chosen final name aligns with:

- trust
- clarity
- emotional friendliness
- visual strength

Messaging Architecture

Pillar	Description
Clarity Over Complexity	“Finance doesn’t need to sound complicated to be correct.”
Emotionally Intelligent Decisions	Acknowledging money fears, shame, and upbringing.
Progress, Not Perfection	Sustainable financial improvement.
Cultural Awareness Matters	What money means depends on where you’ve been.

Micro-Messaging Themes

These are used across content:

- “You deserve financial clarity.”
- “Let’s talk about money the way real people actually experience it.”
- “Your financial journey is yours – not your parents’, not society’s.”
- “Money is emotional. Let’s address that, too.”

Brand Experience Across Content

Brand isn’t what you say – it’s how you show up.

So I developed **behavioural rules** for how the brand manifests.

Filming Guidelines → Brand Behaviour

- Warm lighting → psychological safety
- Clean, minimal background → clarity & calm
- Black shirt → authority without ego
- A single colourful object → creative humanity

Editing Guidelines → Brand Feel

- Calm cuts, minimal effects → trust

- High-quality sound → professionalism
- Text overlays using brand fonts → consistency

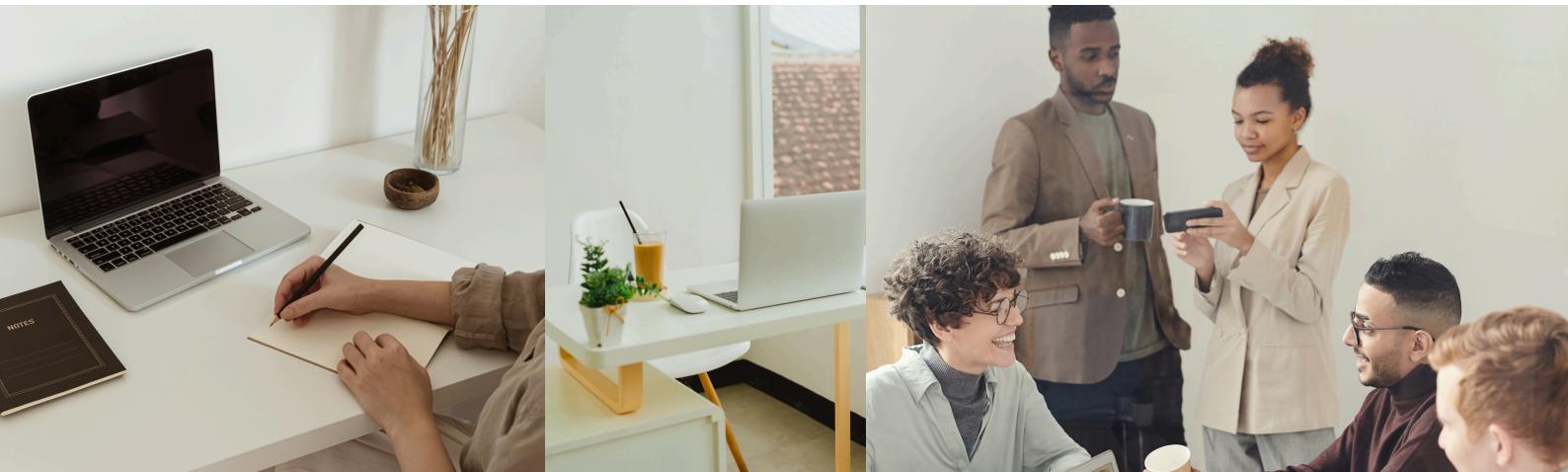
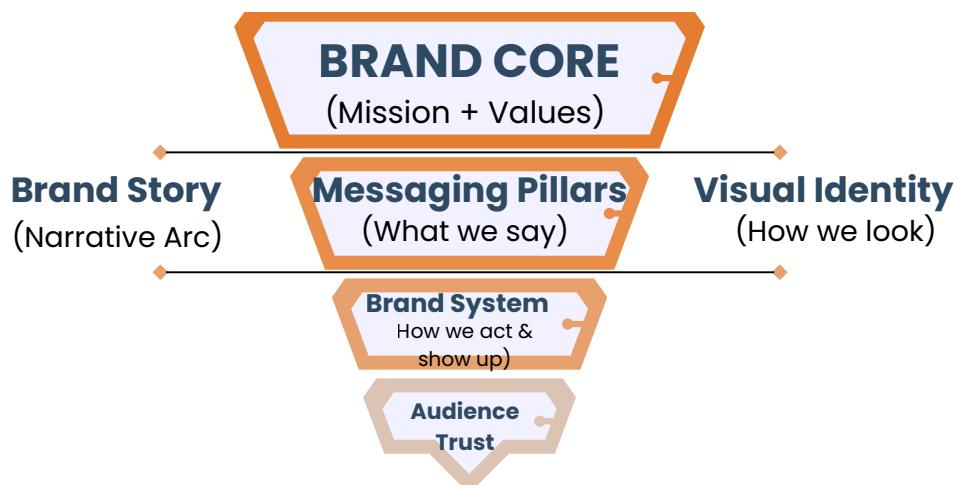
Music Guidelines → Emotional Framing

- No trendy, high-tempo tracks
- Favour subtle, ambient, reflective sounds
- Use humour lightly, purposefully

The result?

Content that *feels safe, premium, and human.*

Brand Framework Diagram



My Role & Contribution

I led the project end-to-end, including:

- Cultural, emotional, and behavioural audience analysis
- Brand identity definition
- Brand personality development
- Voice, tone, and messaging system
- Visual identity direction
- Naming strategy informed by neuromarketing
- Filming, editing, and communication guidelines
- Storytelling frameworks
- Brand application across YouTube and social platforms
- Narrative crafting for channel descriptions and bios
- Strategic content positioning within the niche

This work created a **complete, scalable brand ecosystem** ready for growth, monetisation, and long-term audience loyalty.

Closing Reflection

This branding project was not just an aesthetic exercise – it was the construction of a *trust space*. A brand that respects cultural nuance, honours emotional vulnerability, and invites people into financial clarity without judgement.

By grounding the brand in **truth**, **humanity**, and **global awareness**, the creator now enters the personal finance niche not as another voice – but as a much-needed guide.

