



**The Motley Fool  
Foundation**

# GAME PLAN

**OUR THREE-YEAR  
STRATEGY AND  
PLAN**

2024-2026



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# Executive Summary

Dear Fools,

We share The Motley Fool's vision of a world that is smarter, happier, and richer. We are committed to serving the more than 200 million Americans currently living paycheck to paycheck or worse. By increasing knowledge and access to Financial Freedom, we believe we can empower more people to live a life of choice.

Over the last several months, we've embarked on an inclusive journey to develop our Foundation's strategy for FY24–FY26. Our approach began with an analysis of future socioeconomic, political, and technological trends. We then reviewed research from industry leaders, including the 2023 Mapping Study, to uncover insights from practitioners serving Americans living paycheck to paycheck.

Lastly, we examined our Foolish strengths.

Key takeaways from our research significantly inform our FY24–26 Strategy and Plan. Firstly, advancements in AI and machine learning technologies will provide unprecedented ease and speed of access to information. Aligning our future actions with such advancements is essential, as innovation and data are crucial for enabling equitable access for millions. Secondly, Financial Freedom is more than an idea—it's a growing movement. People need to understand the issues, see themselves as part of the solution, and take collective action, as the problem is escalating and time is critical.

Therefore, we've agreed on the following as our FY24–FY26 strategic priorities:

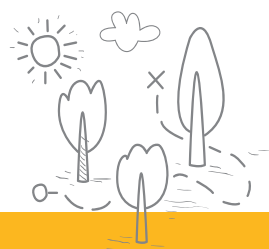
1. Drive innovative investments that disrupt systems to enable people to take the next step toward Financial Freedom.
2. Drive awareness and conversation around Financial Freedom to demystify the path and increase access.
3. Drive engagement to get people to take action (unite strivers and thrivers).
4. Drive sustainability and operational efficiency to underpin The Foundation's long-term success.

To date, our collective reach—or the total number of people served—is over one hundred thousand individuals across the USA and is continually growing. We measure our impact by the total number of people served, the steps taken by those living paycheck to paycheck towards Financial Freedom, and ensuring a financially sustainable organization. Our unique approach of removing systemic barriers, connecting Financial Freedom drivers, engaging our most valuable asset—our Fool membership—and utilizing our Foolish voice/platform will shift mindsets and galvanize long-term impact. We embrace the unwavering truth that our journey is one of constant learning and growth. Each step we take, and each inclusive pathway created propel us forward toward meaningful outcomes, enabling wealth for all.

We welcome your feedback! Thank you for everything that we are and all that we will be.

Fool forward!

**Jennifer**



# Vision, Mission and Purpose



Imagine a society where everyone benefits and everyone is invited to have an equal chance for a prosperous life – a place where all people have the ability to spend more money, save more money, and invest in themselves and their future without barriers. It's a more robust, resilient economy that flourishes for the long term.

**This is Financial Freedom, and it changes everything for the better. For everyone.**



## Vision

Financial Freedom for all



## Mission

We are on a mission to create pathways to Financial Freedom for those living paycheck-to-paycheck

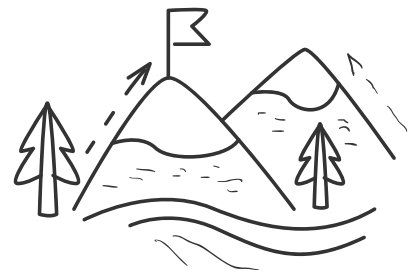


## Purpose

To find, fund, and amplify innovative solutions that enable strivers to become thrivers

# Who We Serve

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**200 Million Americans who are currently living paycheck to paycheck or worse.**

That's two out of every three people you encounter each day. People who struggle to pay the rent. People who have to choose between paying a bill and putting food on the table. People who are juggling the challenge of getting an education while also supporting others. They face real barriers and obstacles that set and keep them behind, with no end in sight. We believe we will have the highest return on donated dollars and impact by focusing on this swath of Americans based on their willingness and readiness to take their next step towards Financial Freedom.

**FINANCIALLY  
VULNERABLE**

OUR FOCUS  
**200 Million Americans Living  
Paycheck to Paycheck\***

**FINANCIALLY  
HEALTHY**

\*Source: 2022 Financial Health Pulse U.S. Trends Report, FHN



# Core Values

We have adopted The Motley Fool's core values\* and intend to adjust them to better fit the culture of The Foundation. \*core values as of 2023

**Collaborative**  
Do great things together.

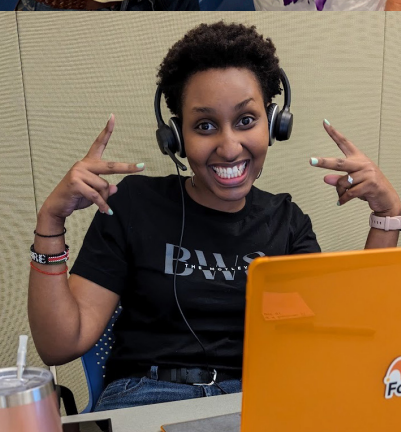
**Innovative**  
Search for a better solution.  
Then top it.

**Fun**  
Revel in your work.

**Honest**  
Make us proud.

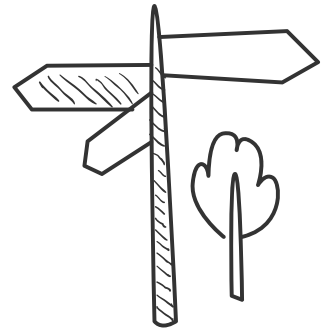
**Competitive**  
Play fair, play hard, play to win.

**Motley**  
Make Foolishness your own.

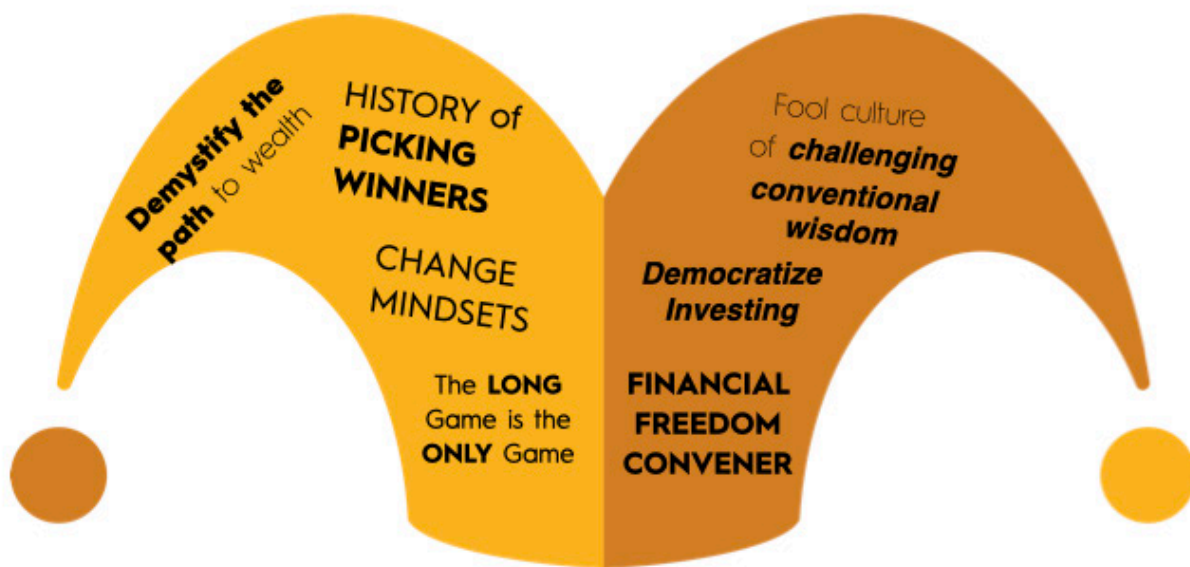


WHO WE ARE

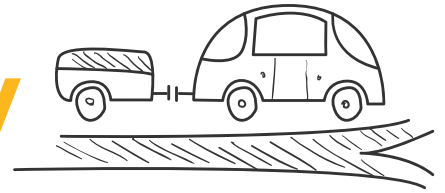
# Leveraging Foolish Core Strengths



The Foundation serves at the heart of the Fool, providing an opportunity for members to collectively ‘pay it Foolward.’



# Strategic Overview



Four Strategies Paving Our Path to Impact: A Game Plan We Can Rally Behind!

## Financial Freedom for all

### Innovative Investments

**Drive Innovative** Investments that disrupt systems, unify the drivers, and enable individuals to take their next step toward Financial Freedom.

#### How?

- **Evolve the Rule Breaker Program:** Continually invest in Social Innovators and propel our program to Version 2.0.
- Research and develop a mechanism to measure steps toward Financial Freedom
- **Focus on Financial Literacy:** Invest in a program that drives and emphasizes financial education.



### Awareness

**Drive Awareness** of, and the conversation around Financial Freedom to demystify the path and increase access

#### How?

- **Become a Prominent Voice:** Utilize our platform and forge content partnerships to position us to lead the Financial Freedom conversation.
- **Educate on Key Issues:** Address crucial topics within and between the drivers.
- **Leverage Relationships:** Integrate closely with The Motley Fool and utilize its resources and relationships.

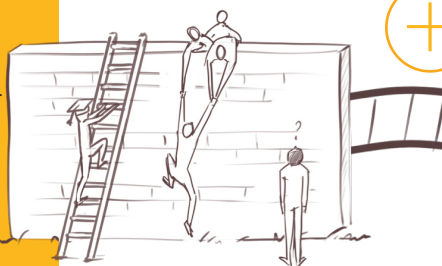


### Drive Engagement

**Drive Engagement** to get people in the game, and unite "strivers" and "thrivers" for action.

#### How?

- **Build the Fools for Good Community:** Significantly increase its membership numbers annually.
- **Implement High-Touch Relationship Management:** Employ marketing automation strategies to deliver customized user journeys by stakeholder segment.
- **Provide Volunteer Opportunities:** Enable members to contribute their time, talent, or treasure.

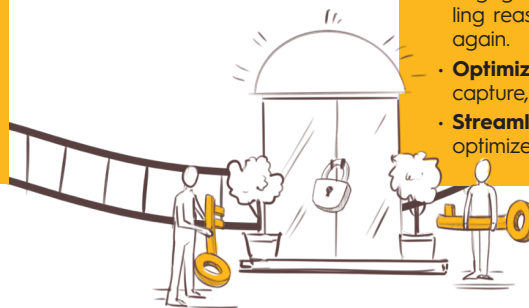


### Drive Sustainability

**Drive Sustainability** and operational efficiency to undergird The Foundation's long-term success.

#### How?

- **Diversify Revenue Streams:** Explore various income sources.
- **Retain Donors:** Keep donors engaged and provide compelling reasons for them to contribute again.
- **Optimize Data Use:** Improve data capture, utilization, and timing.
- **Streamline Processes:** Simplify and optimize operational workflows.





CONCLUSION:

# What Does Success Look Like?



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Imagine a day when everyone is equipped with what they need not just to survive but to thrive, a day when everyone is afforded an equal opportunity to flourish. This dream—a dream of a more equitable society—propels us toward a singular, pressing mission: to create more pathways to Financial Freedom, making it a reality for all. To reiterate, we measure our impact by the total number of people served, the steps taken by those living paycheck to paycheck towards Financial Freedom, and the achievement of a financially sustainable organization.

We invite our members, partners, and other influencers to join us in making strategic, long-term investments that will bring us closer to our shared goal. Success isn't merely about reaching our goal—it's about the journey we embark upon, the lives we change, and the society we transform along the way. Success is witnessing our dream materialize, day by day, as we evolve the concept of Financial Freedom from a mere vision to an open conversation in the U.S. and, ultimately, a lived reality for all. Let's inspire—and be inspired—as we construct this future together.

Our strategy and plan will evolve into an active campaign for Financial Freedom with a central learning and action engine housed on our website, [www.foolfoundation.org](http://www.foolfoundation.org).

# THANK YOU FROM ONE FOOL TO ANOTHER

  
**The Motley Fool  
Foundation**




## Get In Touch

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 [www.foolfoundation.org](http://www.foolfoundation.org)

 @foolfoundation

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