



## Meeting the needs of vulnerable customers

### Additional resources

[www.mib.org.uk](http://www.mib.org.uk)

[www.alzheimers.org.uk](http://www.alzheimers.org.uk)

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

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

[www.mind.org.uk](http://www.mind.org.uk)

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

[www.moneyandpensionservice.org.uk](http://www.moneyandpensionservice.org.uk)

[www.citizensadvice.org.uk](http://www.citizensadvice.org.uk)

[www.ageuk.org.uk](http://www.ageuk.org.uk)

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

### What can you do to help?

- Offer audio versions of written communications
- Ensure text can be read by screen reader / have a screen reader
- Consider the colour of the background in documentation or web pages.
- Use clear colour contrasts
- Ensure colour schemes are clear and consistent throughout your marketing
- Have a braille option
- Use simple and effective language, without being patronising
- Ensure the key messages are direct and easy to understand
- Avoid the use of acronyms or industry used terms
- Consider clear contact points throughout the journey
- Offer multi-channel options for your processes e.g. online, phone, zoom, in person

### 5 key components to help customers understand their finances

1. Basic budgeting
2. The impact and concept of interest
3. Savings
4. Credit and debt basics
5. Identity theft issues and financial safety, e.g. fraud

### 3 ways to increase customers financial resilience

1. Track spending (use a budget planner)
2. Emergency funds (a rainy day fund)
3. Frequent financial reviews