



Wealthsimple

Style Guide

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Brand Guidelines

Brand Story

Wealthsimple has a few fundamental values it follows in business. These values are factored into how the brand is represented, and how the audience is communicated to.

First, it's all about the client. Wealthsimple goes the extra mile to earn the clients trust and keeps them at the forefront of every crucial decision.

Second, Wealthsimple keeps it simple. The financial industry is complex, and Wealthsimple seeks to empower clients by building simple and accessible products. For this reason, the communication — internally and with clients — is kept simple.

Third, diversity and inclusion build better products. Collaborating with diverse people builds products that can be used by everyone. Wealthsimple continuously seeks to foster empathy and accountability in all aspects of business.

Brand Personality

The Wealthsimple brand and culture are defined through our values. Our brand reflects who we are as a company, what we represent in the investment sector, and our commitment to provide equal opportunity for everyone to build financial wealth.

Our culture defines our product and creates our brand. First and foremost, we take care of each other.

Our brand represents what we bring to work as colleagues through our services and interactions with our valued clients.

We are deliberately concise, articulate, and understanding with one another and our clients.

We are workers who are experts in our field, but strive to remain open-minded. We believe in having confidence, but stay humble.

Brand Voice

Wealthsimple makes investing accessible. Clients are presented with simple, sophisticated, and affordable financial products that are available to everyone.

The core values are communicated through the Wealthsimple voice which is simple, informative, and conversational.

Our brand voice is represented as a professional that is:

- Familiar with investing and the Wealthsimple platform.
- Intelligent, empathetic, inclusive, and accommodating.
- Ready and willing to help.
- Smart and technologically competent.

The Wealthsimple persona embodies these attributes by presenting complex financial information in clear and straightforward terms.

Brand Colours

Colour Story

Investing should feel and look more human.

Wealthsimple's color story injects a warm, contemporary color palette into a sea of blues and greens seen in traditional financial institutions.

The brand uses shades of primary colors, and features warm colors such as reds and yellows.



Primary Colours



Light Cyan

RGB (124, 183, 182)

CMYK (32, 0, 1, 28)

#7CB7B6



Warm Red

RGB (237, 90, 63)

CMYK (0, 62, 73, 7)

#ED5A3F



Rich Yellow

RGB (250, 177, 49)

CMYK (0, 29, 80, 2)

#FAB131

Greens



Dark Green

RGB (60,130,128)

CMYK (54,0,2,49)

#3C8280

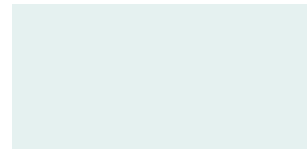


Light Green

RGB (237, 90, 63)

CMYK (32, 0, 1, 28)

#7CB7B6



Light Green

RGB (229, 241, 240)

CMYK (5, 0, 0, 5)

#E5F1F0

Reds



Warm Red

RGB (237, 90, 63)

CMYK (0, 62, 73, 7)

#ED5A3F

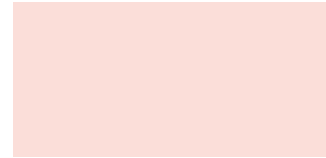


Soft Red

RGB (242, 124, 94)

CMYK (0, 49, 61, 5)

#F27C5E



Light Red

RGB (251, 222, 217)

CMYK (0, 12, 14, 2)

#FBDED9

Yellows



Rich Yellow

RGB (250, 177, 49)

CMYK (0, 29, 80, 2)

#FAB131



Soft Orange

RGB (251, 188, 80)

CMYK (0, 25, 68, 2)

#FBBC50



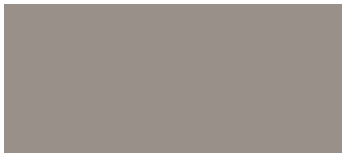
Light Orange

RGB (253, 216, 152)

CMYK (0, 15, 40, 1)

#FDD898

Beiges

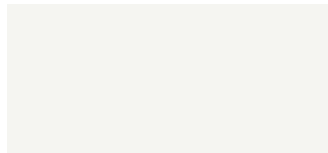


Dark Grayish Orange

RGB (153, 144, 138)

CMYK (0, 6, 10, 40)

#99908A

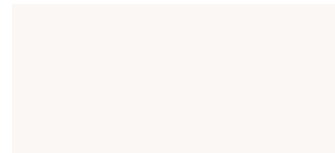


Light Grayish Yellow

RGB (245, 245, 241)

CMYK (0, 0, 2, 4)

#F5F5F1



Light Grayish Orange

RGB (250, 247, 245)

CMYK (0, 1, 2, 2)

#FAF7F5

Greys

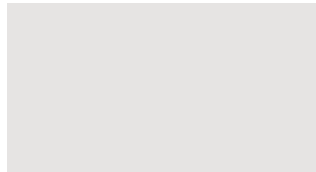


Dark Orange

RGB (64, 62, 61)

CMYK (0, 3, 5, 75)

#403E3D

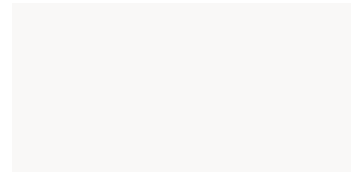


Light Orange

RGB (230, 228, 227)

CMYK (0, 1, 1, 10)

#E6E4E3



Light Grayish Orange

RGB (249, 248, 247)

CMYK (0, 0, 1, 2)

#F9F8F7

Product Colours

We also segment our brand colors to highlight and differentiate our product lines – like Wealthsimple crypto or tax. You will find that the variations of the below colors are used to represent each product.

Invest



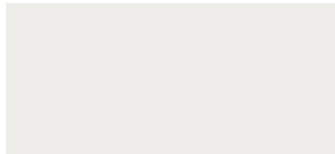
Light Orange

RGB (242, 197, 121)

CMYK (0, 19, 50, 5)

#F2C579

Cash



Light Yellow

RGB (238, 237, 234)

CMYK (0, 0, 2, 7)

#EEEEDE

Trade



Grayish Cyan

RGB (187, 212, 414)

CMYK (12, 0, 4, 17)

#BBD4CC

Crypto



Lilac Luster

RGB (171, 145, 168)

CMYK (0, 15, 2, 33)

#AB91A8

Tax



Medium Cyan Blue

RGB (124, 165, 207)

CMYK (40, 20, 0, 19)

#7CA5CF

Logos

Logo Specifications

The Wealthsimple logo should be primarily used on a white background. When necessary, the logo should be placed on a contrasting background – black or any branded colours are acceptable. Do not use the primary logo on top of photography unless it's positioned on top of a solid-colored background

The logo should be minimum 185px x 28px in size. The “W” in the Wealthsimple logo can be used as a spacing guide.



Lettermark Logo

The shorthand, “W” logo can be used on the Wealthsimple app, and social media where space is limited.

The lettermark “W” can be placed on contrasting colours – white logo on black, or vice versa. All other instances must include the logo on a background that adheres to their respective product lines, and Wealthsimple’s colour story overall.



Invest



Trade



Tax



Cash

Incorrect Logo Use

Do not crop

Wealth

Do not change the color

Wealthsimple

Do not add special effects

Wealthsimple

Do not blur the logo

Wealthsimple

Do not change the transparency

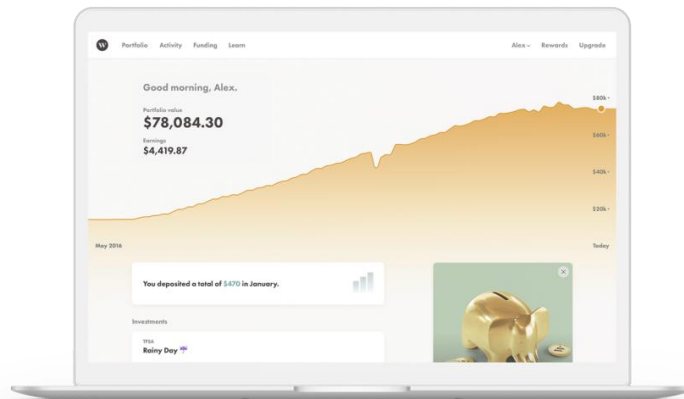
Wealthsimple

Imagery

Image Standards

Investing should feel personal.

Wealthsimple wants to move from the typical, cliché stock photography of business people in suits, to something more relatable...like high-resolution images of wealth.



Avatars

Be human, relatable, not overly colourful, but still personable and professional. Use a white background for all clients and financial adviser avatars.



Graphs

Our clients monitor their financial trajectory through graphs. They depict investment profit, loss, and provides real-time responses when interacting with the graph. The graph colours be represented in brand colors, and correlate with their product lines (see: [product colours](#))

Wealth

Represent wealth in all shapes and forms, but include the Wealthsimple (“W”) symbol in every instance. Wealthsimple loves to represent money in all it’s glory— moneybags, coins, vaults, parachutes, and other instances relating to currency or financial security.

Use gold and bronze for all primary instances of money. All other precious metals (silver, diamond/crystals) can be used as secondary instances to catch the reader's eye.

Still Life Photography

Similar to our brand voice, all photography direction is based on 2 spectrums: from professional to approachable, and from knowledgeable to successful.

Use crisp, high-resolution images of both people and product screenshots throughout customer touchpoints. These may feature members of our leadership team, customer personas, or anything that shows the Wealthsimple brand in a positive light.



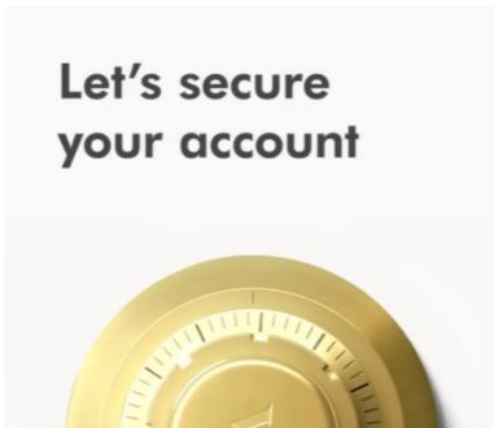
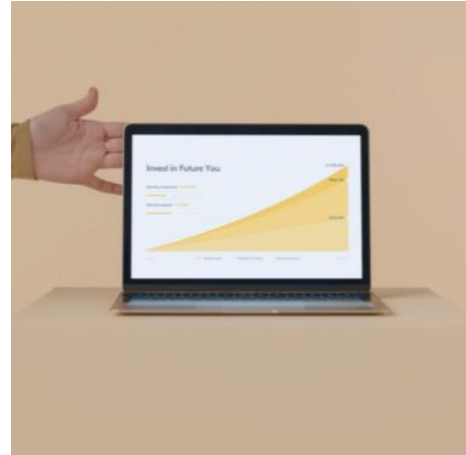
Social Media

We add a human approach to investing. People are the key focus on our social media channels, and our goal is to offer diverse perspectives to investing. Social media is used to educate the audience on financial wellness, and also promote Wealthsimple.

Across all social media touchpoints, use high-resolution photography images or illustrations (with or without text).


Investing shouldn't feel boring. Use bright colors to keep the audience's attention. Incorporate short videos or gifs when you can.

All communications should align with the brand's color story, language, and voice.



Typography

Typography Sample

<p>H1 Caslon Graphique Bold, 32/34</p>	<h1>Why join Wealthsimple?</h1>
<p>H2 Caslon Graphique Bold, 24/26</p>	<h2>Investment made easy, for every walk of life</h2>
<p>H3 Caslon Graphique Bold, 18/20</p>	<h3>The kind of investment that will make you wish you started earlier. Our team of financial advisers are standing by to assist you today.</h3>
<p>H4 Caslon Graphique Bold 13/14</p>	<h4>Investing, made simple. For you, by us.</h4>
<p>P Arial 8/10 Optical Kerning, -7.5 Tracking</p>	<p>The history of the world is the story of those who've had access to the tools that build wealth and those who haven't. We want to change that history.</p> <p>And we think technology is the vehicle for that change. Because, if you build it right, technology can be a tool to make things fairer, to create a system in which it doesn't matter where you come from, what you do for work, or if you have any idea what an ETF is.</p> <p>But removing every single barrier that stands between human beings and their financial freedom is going to require some work.</p> <p>Financial products have always been about as much fun to use as medical devices. Why shouldn't they be as intuitive, beautiful, and useful as the best software in the world? Wouldn't it be better if people enjoyed engaging with their money?</p>
<p>Quote Introductory Text Arial, 28/30</p> <p>Pull Quote Arial Italic, 8/10</p> <p>Quote Source Caslon Graphique Bold, 16/18</p>	<div>  <p>Join over 1.5 million people who use Wealthsimple products</p> <p><i>"Wealthsimple is changing the way young people think about money"</i></p> <p>Forbes</p> </div>

Calson Graphique

**Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj Kk
Ll Mm Nn Oo Pp Qq Rr Ss Tt Uu
Vv Ww Xx Yy Zz 0 1 2 3 5 6 7 8 9**

Thin

Lorem ipsum dolor sit amet.

Thin Italic

Velit esse cillum dolore eu.

Light

Laboris nisi ut aliquip ex.

Light Italic

sint occaecat cupidatat non.

Regular

Duis aute irure dolor in.

Regular Italic

Consectetur adipiscing elit.

Bold

Ut enim ad minim veniam.

Bold Italic

Quis nostrud exercitation.

Using Calson Graphique

Used for logos and headings.

Follow these guidelines when using Caslon Graphique:

- Never set in all caps or lowercase.
- Set in sentence case and set tracking to 0 when creating headings on embedded or printed collateral.
- Set letter spacing to -2px for larger headlines and -1px for smaller headlines on the web.
- Use outside headings strictly to cite a quote from a well-known media source (e.g.: Forbes)

Note: The font will need to be downloaded manually for use. You can download it from [here](#). Follow regular brand font guidelines after importing Caslon Graphique when creating content for Wealthsimple.

Arial

**Aa Bb Cc Dd Ee Ff Gg Hh Ii Jj Kk
Ll Mm Nn Oo Pp Qq Rr Ss Tt Uu
Vv Ww Xx Yy Zz 0 1 2 3 4 5 6 7 8 9**

Book

Laboris nisi ut aliquip ex.

Book Italic

sint occaecat cupidatat non.

Regular

Duis aute irure dolor in.

Regular Italic

Consectetur adipiscing elit.

Bold

Ut enim ad minim veniam.

Bold Italic

Quis nostrud exercitation.

Using Arial

Used for body text.

Follow these guidelines when using Arial:

- Always set letter spacing to -0.5px for title case and 0px for normal paragraph instances.
- Do not set any content in all lowercase or all capital lettering.
- Set as sentence case or title case (as determined by the content being created or altered), and set the tracking to -7.5px.
- Set body text color as white on the following background colors for readability: all variations of green, purple, blue, brown, and black.
- Typeset all paragraphs and text aside from headings.

Writing Style

Abbreviations

Wealthsimple is a financial app – so it is common to find a multitude of financial-related terms on our touchpoints.

The simple rule is to abbreviate the acronym at the start of the blog, site, or message, and use the abbreviation from that point on.

Abbreviations and capitalization are used for different types of investing as follows:

- Canadian Deposit Insurance Corporation (CDIC)
- Canadian Investor Protection Fund (CIPF)
- Exchange-traded funds (ETFs)
- Incorporated (Inc.)
- Investment Industry Regulatory Organization of Canada (IIROC)
- Registered Retirement Savings Plan (RRSP)
- Tax Free Savings Account (TFSA)
- Two-factor authentication (2FA)
- Wealthsimple Digital Assets (WDA)

Compound Adjectives

Link compound adjectives using hyphens without spaces. Here are the approved compound adjectives we use:

- Commission-free
- Common-law
- Day-trade
- Ever-expanding
- Government-mandated
- Low-priced
- Most-discussed
- Non-resident
- Over-contribute
- Step-by-step
- Robo-advisor
- Robo-investing
- Tax-advantaged
- Tax-exempt
- Tax-free

Special Spelling

Some trade and stock options include the use of special characters. In these cases, use the direct name of the company, trade, and/or stock options exactly as they appear. Do not replace special characters during these instances.

- **Company and trade stock names:** replace “Incorporated” with the abbreviation “Inc.”
- **Names:** appear as Firstname Lastname. Here are additional specifications for names.
 - **Clients:** Do not mention their names publicly due to confidentiality agreement.
 - **Wealthsimple team members:** Include name and their job title under their headshot. Bold their names.
- **Stocks / stock exchange:** Capitalize the ticker symbols. AAPL, AMZN are all capitalized. So is NASDAQ.

Punctuation and Symbols

Capitalize all proper nouns, including company names (e.g., Apple, Google) on the platform.

Keep it simple and casual. The use of “we’ve” for we have, and “don’t” for do not, is completely fine.

Never use ampersands (&). The plus symbol (+) is used in headings in the place of ‘and’.

For sentence casing, conform to these guidelines:

- Avoid using punctuations in headings for web materials and presentations.
- **Body:** Use proper Canadian grammatical and spelling conventions.
- **Heading 1 and 2:** Do not use periods to conclude sentences. Use question marks (“?”) when applicable and never use exclamation marks (“!”) in any circumstance.
- **Heading 3 and 4:** Use proper grammatical punctuation.

Numbers and Dates

Always conform to these guidelines when using numbers and dates:

- Do not use subscript or superscript for numbers or dates (i.e: 2nd of July, August 5, 2011).
- Include separators for numbers >1,000 (always 12,995, not 12995)
- Maintain phone number formatting as ABC-EFG-HIJK with no parentheses around area code (i.e: 855-255-9038).
- Use digits for all numbers, including numbers <10.

Currencies

All numbers representing currency or monetary aspects must:

- Always use a \$ before the amount (\$12,995; not 12995 or \$ 12,995)
- Include cents for all currencies for accuracy of monetary aspects
- Include proper use of separators for currency:

Currency Value

Example

Cents

\$0.87

Single digits

\$7.96

Double digits

\$12.22

Hundreds

\$147.89

Thousands

\$2,456.96

Hundreds of thousands

\$123,456.34

Millions

\$1,112,345.12

Billions

\$1,025,562,312.78

Wording and Tense Usage

Wealthsimple is a proudly Canadian company. We conform to Canadian English grammatical and spelling conventions. Refer to the Canadian Oxford Dictionary.

All use of language should be simple, understandable, and concise.

Wealthsimple communicates in present tense with some exceptions.

Use past tense when:

- Discussing company growth or history.
- Referring to past investments, e.g., “one month ago, your stock with Apple was worth X. Today, that same stock is worth Y.”

Use future tense when:

- Referring to future investment projections, e.g., “your stock growth is projected to gain 1.2% in the next 2 months based on the past year, although we cannot be sure until then.”

Writing for the Web

All of Wealthsimple communications and information is available strictly on the web. When writing for Wealthsimple web components:

Do:

- Conform to Wealthsimple color guidelines
- Create mock-graphs for web components when needed.
 - Always show exponential growth and wavering peaks/pits.
- Keep headings short, sweet and self-explanatory.
- Organize lists in alphabetic order to maintain consistency.
- Use as much whitespace as possible.

Don't:

- Do not place a lot of content within each heading.
 - Only what is necessary in the simplest terms possible.
 - Refer to 'voice and tone' for more information.
- Do not use more than 4 heading styles per webpage. See Typography section for best practices.
- Do not use punctuation in headings, use in subheadings only.
- Never post confidential client information.



General Terms

Terms and Conditions

- a. Wealthsimple© permits their partners, developers, customers, and the general public/media to use their trademarks, logos, name, screenshots, web pages, and other publicly available brand assets as specified strictly by these guidelines and taking place in only the allowed circumstances. By using this information listed, you are thereby agreeing to follow these guidelines.
- b. Any use of Wealthsimple brand assets must be within these guidelines:
 - i. These guidelines may be modified at any time at Wealthsimple's discretion.
 - ii. Wealthsimple's discretion extends to their decision in determining if you are in violation of these guidelines.
 - iii. Wealthsimple is the owner of all rights to their platform and brand.
 - iv. To stay up to date on these guidelines, visit [Wealthsimple's terms of use](#).
- c. Wealthsimple's brand assets and identifiers include the Wealthsimple logo, name, any phrases known to be publicly associated with the brand, use of images and screenshots from Wealthsimple's brand platforms or websites, and any other aspect that identifies with any Wealthsimple products or services.
- d. List of trademarks¹:
 - i. Wealthsimple™
 - ii. WEALTH SIMPLE™
 - iii. Wealthsimple Trade™
 - iv. Wealthsimple Invest™
 - v. W4W™

1: View the publicly available brand trademark registration [here](#) if needed.

Questions?

Reach out to us by phone at 1-855-255-9038 or by emailing us at help@wealthssimple.ca. For questions related to this style guide, place “Style” in the email subject.

Curious About Wealthsimple Products?

Use our [help site](#) to file a request.

