***Template Email Outreach***

Messaging for current partners, prospects, and HR professionals.

**Existing Workplace Banking Partner**

***Email One: Introduction***Hi <Contact Name>,

What’s the number one reason for stress among your employees? It’s not job security or health concerns, but [**money worries**](https://www.pwc.com/us/en/services/consulting/workforce-of-the-future/library/financial-well-being-retirement-survey.html) **by a wide margin** (58%), according to PwC’s most recent Employee Financial Wellness Survey.

As a valued business partner of <Financial Institution>, I want to make you aware of a workplace financial wellness education program we offer as a free service to your employees. Our program consists of **online educational lessons**, **in-person workshops**, **promotional materials** and more can help your organization’s greatest asset better manage their personal finances.

Again, we offer this service at no cost to your company or to your employees. Please see the attached overview for more information, and I can go into more detail live. Do you have 30 minutes next week to discuss?

Thank you,

<Sales Rep>

*Source: PwC’s 9th annual Employee Financial Wellness Survey COVID-19 Update, PwC US, 2020.*

***Email Two: Follow Up***

Hi <Contact Name>,

In your role as an HR professional at <Company Name>, you probably see first-hand how money worries lead to reduced productivity.

In fact, **American businesses are losing $500 billion per year** due to employees’ personal financial stress, according to a [survey](https://us.salaryfinance.com/us/blog/half-of-us-workforce-suffers-poor-mental-health-due-to-money-worries/) by Salary Finance.

This is just **a reminder that <Financial Institution>,** your organization’s financial partner, **offers a workplace financial wellness education program** available **at no cost** to your organization or to your employees.

Are you available at <time> on <date>? If so, we can discuss how you might offer this program as part of your employee benefits package.

Best,

<Sales Rep>

*Source: Salary Finance 2019 Wellness Guide*

***Email Three: Additional Follow Up***

Hi <Contact Name>,

In just six years, the number of **American companies offering financial wellness education** has **more than doubled** to 53%, according to a Bank of America [survey](https://newsroom.bankofamerica.com/press-releases/global-wealth-and-investment-management/employers-offering-financial-wellness).

Why are so many companies offering this as a part of their benefits package? [The top reasons](https://www.shrm.org/resourcesandtools/hr-topics/benefits/pages/employers-double-down-on-financial-wellness.aspx), according to the Employee Benefit Research Institute:

* Overall worker satisfaction improved (37 percent)
* More money was saved in existing retirement plans (31 percent)
* Employee stress was reduced (31 percent)
* Employee retention improved (28 percent)

The bottom line: THESE PROGRAMS WORK**. <Financial Institution>,** your organization’s financial partner, can provide your employees with a time-tested initiative **available at no cost** to your organization or to your employees.

Do you have time on <day> or <day> this week to discuss?

Thank you,

<Sales Rep>

*Source: SHRM, Bank of America 2019 Workplace Benefits Report*

**Prospective Workplace Banking Partner**

***Email One: Introduction***

Hi <Contact Name >,

A recent [survey](https://www.prnewswire.com/news-releases/john-hancock-research-shows-financial-stress-costs-companies-2-000-per-employee-annually-300763511.html) from John Hancock reveals that 72% of workers admit to **being distracted on the job due to worries about personal finances.**

As an employer, you know how this distraction leads to lost productivity, increased absenteeism and a contracting bottom line.

I'm writing to let you know about **a free financial wellness education program <Financial Institution> has recently launched** for businesses in our community. Our online and in-person financial education program can help alleviate employee stress and empower your employees to take control of their futures.

Please see the attached for more information, and I can go into more detail live. Do you have 30 minutes next week to discuss?

Thank you,

<Sales Rep>

*Source: John Hancock Financial Stress Survey*

***Email Two: Follow Up***

Hi <Contact Name>,

In your role at <name of company>, you probably see first-hand how **money worries lead to reduced productivity.**

In fact, **American businesses are losing $500 billion per year** due to employees’ personal financial stress, according to a [survey](https://us.salaryfinance.com/us/blog/half-of-us-workforce-suffers-poor-mental-health-due-to-money-worries/) by Salary Finance.

This is just **a reminder that <Financial Institution**> **offers a workplace financial wellness education program** available **at no cost** to your organization or to your employees.

Are you available at <time> on <date>? If so, we can discuss how you might offer this program as part of your employee benefits package.

Best,

<Sales Rep>

*Source: Salary Finance 2019 Wellness Guide*

***Email Three: Additional Follow Up***

Hi <Contact Name>,

Worries about finances are among the leading causes of stress for today’s workers. And many (more than 7 out of 10) admit to [**worrying about personal finances while on the job**](https://www.prnewswire.com/news-releases/john-hancock-research-shows-financial-stress-costs-companies-2-000-per-employee-annually-300763511.html)**.**

**<Financial Institution> can help <company name> reduce workplace stress** by providing financial education as an employee benefit.

Using our tools and support, we’ll tailor a program that will:

* ENGAGE your employees with a best-in-class financial education curriculum.
* EVALUATE to determine relevant topics for in-person workshops.
* EDUCATE with <Financial Institution> reps who will conduct workshops based on data collected by your HR team.
* CONNECT with post-workshop content online that they review at their leisure and share with their families.

Do you have time on <day> or <day> this week to discuss?

Thank you,

<Sales Rep>

*Source: John Hancock Financial Stress Survey*

**Targeted Human Resources Email**

Dear < Contact Name >

As an HR professional, you see first-hand how many of your employees stress over their personal finances. A recent survey from John Hancock reveals that 72% of workers admit to [**worrying about personal finances while on the job.**](https://www.prnewswire.com/news-releases/john-hancock-research-shows-financial-stress-costs-companies-2-000-per-employee-annually-300763511.html)

This leads to decrease productivity, an increase in absenteeism and a diminishing bottom line to the tune of **$500 billion per year**, according to a [survey](https://us.salaryfinance.com/us/blog/half-of-us-workforce-suffers-poor-mental-health-due-to-money-worries/) by Salary Finance.

<Financial Institution>’s Workplace Banking program **can help you reduce workplace stress** by providing financial education as an employee benefit. And we provide this service **at no cost to your organization or to your employees.**

Our program of **online educational lessons**, **and virtual and** **in-person workshops** can help your organization’s greatest asset better manage their personal finances.

<Financial Institution>’s Workplace Banking program will:

* **Engage** your employees with a best-in-class financial education curriculum.
* **Evaluate** to determine relevant topics for in-person or virtual workshops.
* **Educate** with <Financial Institution> reps who will conduct workshops based on data collected.
* **Connect** with post-workshop content online that employees review at their leisure and share with their families.

To learn more, visit <INSERT URL>, or let me know a good time to call and I’ll be happy to answer all your questions.

Sincerely,

<Sales Rep>

*Source: John Hancock Financial Stress Survey*