# JANUARY: FINANCIAL WELLNESS MONTH

Module Suggestions: Healthy Financial Habits, Mindful Living, Financing Higher Education

# Graphics





#### **Email Copy**

**Subject Line:** Unlock Your Financial Potential in 2024: Take Charge of Your Financial Wellness!

Happy New Year! As we step into 2024, we're excited to kick off the year with a celebration of Financial Wellness Month. This January, let's embark on a journey together to empower you to take control of your financial future!

At (INSTITUTION NAME), we understand that achieving financial wellness is not just a goal - it's a lifestyle. That's why we're reaching out to invite you to dive into our (NAME OF DIGITAL FINANANCIAL EDUCATION CENTER). It's your go-to resource for invaluable insights and tools designed to elevate your financial well-being. You can expect fun, interactive learning modules that break down complex financial concepts into easy-to-understand lessons.

When you take the first steps to owning your financial wellness, you take control of your own future. The more you know, the easier it will be to feel confident in your spending, saving, investing and long term planning. All of which come together to create your financial wellbeing. You'll be surprised how easy it is to make good financial decisions when you're armed with the information you need for your future.

Get started today by logging on (INSERT LINK TO JOIN) and take control of your financial future!

Social	Social	Social	Social	Hashtags
Cheers to a financially fabulous 2024! Elevate your financial game with (INSTITUTION NAME)'s interactive modules. Let's make this year about empowerment and prosperity!	Ready to level up your financial game? Explore (INSTITUTION NAME)'s (FIN ED CENTER NAME) for your personal financial wellness needs. Your journey starts now!	New year, new financial goals! Unlock the key to success with (INSTITUTION NAME)'s (FIN ED CENTER NAME) to explore fun interactive modules on healthy financial habits, mindful living and more. Let's thrive together!	Happy Financial Wellness Month! Ready to make 2024 your year? Explore our (FINANCIAL ED CENTER) for interactive modules, expert advise and more. Take control of your financial future!	#FinancialWellnessMonth #MoneyMatters #EmpowerYourWallet #NewYearNewYou

# JAN 29 - FEB 2: IDENTITY THEFT AWARENESS WEEK

**Module Suggestion: Identity Protection** 

#### **Email Copy**



**Graphics** 

Subject Line: Safeguard your Identity in 2024: Join Our Identity Protection Module!

Your security is our top priority. In honor of Identity Theft Awareness Week, we're excited to introduce an empowering e-learning module on Identity Protection, designed to equip you with the tools you need to help safeguard vour identity.

#### Why It Matters:

Identity theft can happen to anyone, but knowledge is your best defense. When you sign up for this self-paced module, available 24/7 you will equip yourself with knowledge like:

- How identity theft occurs and the financial impact to victims
- Strategies to protect your identity
- Recognizing signs of identity theft
- Steps to take to report crime and mitigate damage

This Identity Theft Awareness Week, let's empower ourselves to stay one step ahead of potential threats. Get started on the path to a safer financial future by logging on (INSERT LINK TO JOIN) today!

Social





Shield your identity in
2024! Join our Identity
Protection Module
your defense against
digital threats. Log in to
your (FIN ED CENTER
NAME) account and
empower yourself
today!

**Social** 

Your online safety matters! This Identity Theft Awareness Week, enroll in our elearning module on Identity Protection. Log in, learn and level up your digital defense.

Social

Digital threats are real, but so is your power to protect yourself! Enroll in our Identity Protection Module and fortify your online presence. Your security, your rules!

Empower your digital life! This Identity Theft Awareness Week, dive into our Identity Protection elearning module. Arm vourself with knowledge and keep your identity secure. Log in now!

Social

#IdentityProtection2024 #CyberSecurity #StavSecure **#Ditial Safety** #DigitalEmpowerment

**Hashtags** 

# FEBRUARY 4-10: PAY YOUR BILLS WEEK

Module Suggestions: Debt Management, Paying Your Student Loans

#### Graphics

#### **Email Copy**



**Subject Line:** Take Control of Your Finances: Explore Pay Your Bills Week Learning Opportunities

Paying your bills doesn't have to fill you with a sense of doom. Instead, take control of your finances to navigate your financial responsibilities confidently. At (FINANCIAL INSTITUTION), we understand the importance of effective debt management and taking control of your financial well-being. We offer self-paced courses available year round for you to grow the skills and knowledge needed to confidently understand and manage your bills.

Explore our e-learning modules tailored just for you for Pay Your Bills Week:

- Debt Management Essentials will teach you the different types of debt, how to calculate costs of debt, compare payoff options and give you the tools to build your own action plan for paying off and eliminating your debt.
- Paying Your Student Loans: Tackle your student loans head-on with insights into repayment options, consolidation and smart payment strategies.

Get started today by logging on (INSERT LINK TO JOIN) and feel confident about your financial future!





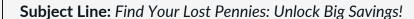
Social	Social	Social	Social	Hashtags
Unlock financial empowerment this Pay Your Bills Week! Explore self-paced modules on debt management and paying student loans. Log in and take charge of your financial future!	Debt weighing you down? This Pay Your Bills Week, dive into our e-learning modules on debt management. Learn practical strategies to lighten your financial load. Log in and transform your financial outlook!	Student loans causing stress? Conquer your repayment journey with our self-paced module. This Pay Your Bills Week, empower yourself with knowledge and take control of your student loans. Log in now!	This Pay Your Bills Week invest in your financial education! Enroll in our modules on debt management and student loan repayment. Log in, learn and take the first step toward a financially empowered future!	#EmpowerYourBills #FinancialFreedom #DebtFreeJourney #StudentLoanFreedom #InvestInKnowledge

# **FEBRUARY 12: LOST PENNY DAY**

**Email Copy** 

Module Suggestions: Preventing Overdraft Fees, Teaching Kids to Budget, Budgeting for Families

**Graphics** 



Happy Lost Penny Day! Today we're celebrating the value of those small, overlooked pennies that, when combined, can lead to significant savings. At (FINANCIAL INSTITUTION), we believe in the power of small steps toward financial success.

Discover Big Savings:

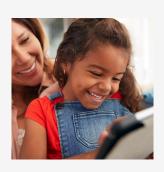
This Lost Penny Day, we're excited to introduce e-learning modules that focus on saving those precious pennies. Dive into topics like preventing overdraft fees, creating a budget and teaching kids the importance of financial responsibility.

Your Learning Journey



- Teaching Kids to Budget: Discover activities to help kids get comfortable with managing money, building the habit of saving and spending wisely.
- Budgeting for Families: Where does all your money go each month? Learn strategies to understand your budget and how to plan for the expected, and unexpected. Small changes can lead to big savings!

Let's start picking up those lucky pennies, finding hidden savings and setting the stage for a financially rewarding future! (INSERT LINK TO JOIN)





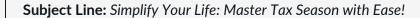
Social	Social	Social	Social	Hashtags
Happy Lost Penny Day! Discover the power of small steps with our e- learning modules. Prevent overdraft fees, create a budget and teach kids to budget. Start saving today!	Small fees adding up? This Lost Penny Day, dive into our modules on preventing overdrafts, creating a budget and teaching kids to budget. Your journey to big savings starts now!	Teach kids the value of a penny! Celebrate Lost Penny Day by exploring our e-learning module on kids' budgeting. Small lessons today lead to big financial wins tomorrow!	Budgeting made easy! Join us this Lost Penny Day and enroll in our modules on preventing overdraft fees and creating a budget. Small changes can lead to significant savings. Let's start the journey together!	#FindYourPennies #FinancialFreedom #SaveSmart #KidsAndMoney #Budgeting101

# **MARCH 3: SIMPLIFY YOUR LIFE DAY**

Module Suggestions: Taxes-The Basics, Taxes-Lowering Your Tax Bill

**Email Copy** 

**Graphics** 



tax journey. Check out our curated e-learning modules just in time for a simplified tax season!

Effortless Navigation Through Tax Basics: Learn tips to stay on top of your taxes and steps for filing so you can avoid stress as the tax deadline approaches. By the end of this session you'll be able to define taxes and explain how they

As tax deadlines approach, simplify your life with confidence. At (INSTITUTION NAME), we're here to streamline your

stress as the tax deadline approaches. By the end of this session you'll be able to define taxes and explain how they are used, identify what personal information you need to gather to file and describe the filing process from start to finish. How simple is that!



Lowering Your Tax Bill: Look no further for resources to help you file taxes or receive tax advice. You'll be able to tell all your friends and family you're a tax buff as you explain the difference between refundable and non-refundable credits and what exactly a tax deduction looks like.

Wishing you a simplified tax season filled with confidence, knowledge and financial success!

Get started today by logging on (INSERT LINK TO JOIN).



Social	Social	Social	Social	Hashtags
Simplify tax season effortlessly! Explore our curated tax lessons to get a leg up on those filing deadlines!	Your toolkit for an uncomplicated tax season! Explore our modules to simplify your filing process, learn what exactly a deduction is and discover resources to help you file.	Make tax season effortless! Dive into our curated modules to learn the basics of taxes and how you can lower your tax bill. Head into your tax filing with confidence, and the right documents!	Simplify your tax journey! Explore our modules to simplify tax complexities and uncover opportunities to reduce your tax burden. Log in to embrace a tax season filled with knowledge and confidence.	#SimplifyYourLifeDay #TaxSeason #SimplifyTaxSeason #EffortlessTaxJourney #SimpleLife

# **MARCH 21: CREDIT CARD REDUCTION DAY**

Module Suggestions: Credit Scores and Reports, Credit Cards, Paying More Than the Minimum

Graphics	Email Copy
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Subject Line: Unleash Financial Freedom: Credit Card Reduction Day Learning Awaits!

Happy Credit Card Reduction Day! At (INSTITUTION NAME), we're here to empower your journey toward financial freedom. Credit cards are just one tool in your financial toolbox. They can be a healthy way to build towards your financial dreams. Sometimes though, we run into some financial concerns with credit cards and we need to reassess how we utilize and manage our credit.

On Credit Card Reduction Day, we invite you to take your credit into your own hands and explore our modules on:

- Credit Card Mastery: Navigate the realm of credit cards strategically. Learn how to wield their power to your advantage, minimizing risks and maximizing benefits aligned with your unique goals.
- Credit Scores and Reports: Uncover the nuances of credit scores and reports, gaining the knowledge to share and enhance your financial profile.
- Beyond Minimum Payments: Break free from the minimum payment cycle. Delve into the impact of paying more than the minimum on your credit cards, unlocking the potential for swifter debt reduction and financial freedom.

Your financial freedom is our priority. These modules are your catalyst for credit mastery, empowering you to reduce debt, elevate your credit standing and embark on a journey to true financial freedom.

Get started today by logging on (INSERT LINK TO JOIN).





Social	Social	Social	Social	Hashtags
Celebrate Credit Card Reduction Day! Revolutionize your credit journey with our exclusive modules. Log in to decode credit dynamics, master credit cards strategically and unlock the potential for swifter financial freedom.	Strategically wield the power of credit cards! Using our session on the power of credit cards you'll learn to minimize risks, maximize benefits and align credit cards with your unique financial goals.	Shape your financial destiny! Credit scores and credit reports are full of intricacies. Take our session on how to decode these statements and take advantage of the tips to create a credit future you design!	Break free from minimum payments! Explore our Beyond Minimum Payments articles to understand the profound impact your payment plan has on your long term financial freedom.	#CreditRevolutionDay #StrategicCreditUse #BreakFree #FinancialEmpowerment

# **APRIL: FINANCIAL CAPABILITY MONTH**

Module Suggestions: Lean into your best performing playlists or highlight something new!

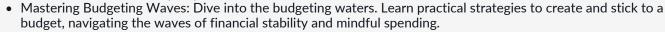
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**Subject Line:** Chart Your Own Financial Odyssey: Navigate Financial Capability Month!

Embark on a financial journey like never before! Happy Financial Capability Month! At (INSTITUTION NAME), we'll be your navigation system as you explore curated e-learning playlists designed to help you chart your financial odyssey and steer towards financial independence.

Set Sail on Your Financial Odyssey:



• Building a Strong Credit Vessel: Explore the essentials of credit building. Discover the steps to establish and maintain a robust credit profile, steering your financial vessel towards greater opportunities.

• Navigating the Investment Constellation: Unveil the world of investing constellations. Whether you're a novice or a seasoned investor, these modules will provide insights and strategies to make informed decisions that will serve you better than any star-guide.

Your financial voyage is unique and these modules are your compass for financial capability. This Financial Capability Month, let's navigate the seas of financial growth together.

Get started today by logging on (INSERT LINK TO JOIN)





Social	Social	Social	Social	Hashtags
Set sail on your financial odyssey! Chart the waves of budgeting mastery with our curated modules. Log in to navigate towards financial stability and embrace mindful spending.	Budgeting mastery awaits on your financial voyage! This Financial Capability Month, prove how capable you are when you dive into our modules on budgeting. You'll learn practical strategies to navigate the waves	Navigate the investment constellations! Explore our investment modules to make informed decisions guiding your financial odyssey!	Your financial odyssey begins! This Financial Capability Month, set sail with our empowering learning modules. Log in to chart new waters and conquer financial horizons.	#FinancialCapabilityMonth #ChartYourFinancialOdyssey #BudgetingMastery #InvestmentGuidance #FinancialBeginnings

# **APRIL 8-12: AMERICA SAVES WEEK**

Module Suggestions: Savings Accounts, Maximize Retirement Savings, Strategies for a High Inflation Economy

**Graphics** 





#### **Email Copy**

**Subject Line:** Boost Your Financial Future - America Saves Week is Here!

Happy America Saves Week! This week is all about empowering you to achieve your financial goals and secure a brighter future. At (FINANCIAL INSTITUTION), we're thrilled to bring you exclusive e-learning modules designed to supercharge your savings journey.

#### **Unlock Financial Success:**

Explore our specially curated modules to elevate your financial game:

- 1. Savings Account Mastery: Dive into the world of savings accounts and learn what types of accounts exist and how they align with your own savings goals.
- 2. Maximizing Retirement Savings: This article will help you dig into the planning your serves and discover strategies for enjoying your golden years to the fullest.
- 3. Strategies for a High Inflation Economy: Navigate economic challenges with confidence. Use these smart strategies to protect and grow your wealth.

This week, let's take a step closer to your financial dreams. Get started today by logging on (INSERT LINK TO JOIN) and take control of your financial future!

Social	Social	Social	Social	Hashtags
Happy America Saves Week! Elevate your savings game with our exclusive e-learning modules. From mastering savings accounts to maximizing retirement savings, we've got your covered. Log in now and supercharge your financial future!	This America Saves Week, invest in your financial future! Enroll in our modules on savings accounts, maximizing retirement savings and strategies for a high inflation economy. Your journey to financial success starts here!	Savings accounts, retirement strategies and inflation-proofing oh my! Explore our America Saves Week elearning modules and take a giant leap toward financial empowerment. Log in now!	Ready to boost your savings? America Saves Week is here! Dive into the world of savings accounts, retirement savings and conquering high inflation. Log in and thrive!	#SavingsSupercharge #AmericaSavesWeek #InvestInYourFuture #FinancialEmpowerment

# **MAY 2: NATIONAL LIFE INSURANCE DAY**

## Module Suggestions: Estate Planning, Shopping for Insurance

**Graphics** 





#### **Email Copy**

**Subject Line:** Secure Your Future: National Insurance Day Learning Modules!

May 2nd is National Insurance Day! Use this day as a gentle reminder to safeguard what matters most - your future. At (FINANCIAL INSTITUTION) we're excited to offer you exclusive e-learning modules to demystify estate planning and guide you through the intricacies of insurance shopping.

**Unlock Your Financial Security** 

Explore our self-paced modules to help you take action on the best insurance options for you and your family.

- Estate Planning Essentials: Secure your legacy with insights into wills and trusts and ensuring your assets are protected.
- Shopping for Insurance: Navigate the insurance market confidently. Learn to evaluate plans and make informed insurance buying decisions.

Your peace of mind is our priority and these modules are crafted to guide you on your journey to financial security.

Get started today by logging on (INSERT LINK TO JOIN). Wishing you a secure and informed National Insurance Day!

Social	Social	Social	Social	Hashtags
Happy National Insurance Day! Explore our e-learning modules on estate planning and insurance shopping. Log in to (FIN ED CENTER NAME) and take charge of securing your financial future!	This National Insurance Day, empower yourself with knowledge! Dive into modules on estate planning and insurance shopping. Log in, learn and take the first step toward financial security.	Shopping for insurance doesn't have to be overwhelming! This National Insurance Day, enroll in our modules to learn the ins and outs of insurance shopping. Log in now and make confident decisions about your coverage!	Protect what matters most! Check out our National Insurance Day modules on estate planning. Log in now to discover strategies to secure your legacy and gain peace of mind for the future.	#InsureYourFuture #NationalInsuranceDay #SecureYourLegacy #EstatePlanning #InformedChoices

# MAY 29: 529 DAY

#### **Module Suggestions: 529 Plans**

#### **Graphics Email Copy** Subject Line: Invest in Their Future: Celebrate 529 Day with Learning Modules! Happy 529 Day! As we celebrate the significance of education savings, (FINANCIAL INSTITUTION) is thrilled to offer you exclusive e-learning modules on 529 plans. Let's take a proactive step toward securing a bright future for your loved ones. **Empower Your Education Savings** Explore our self-paced modules designated for 529 Day. In this session you'll learn the purpose of a 529 plan, compare the benefits and risks with the two types of 529 plans, determine if it meets your needs and take steps to open a 529 plan. Get started today by logging on (INSERT LINK TO JOIN) and take control of your loved ones financial future! Social Social Social This 529 day, let's invest in This 529 Day, unlock the Happy 529 Day! Explore knowledge! Get started our e-learning modules on secrets of 529 plans! Get with our e-learning 529 plans and investing in started with our modules modules and your future. Log in today to and learn how to maximize understanding the power empower your education contributions for a solid of 529 plans. Log in, savings journey. Invest in educational foundation. explore and pave the way their future with Log in, explore and invest

knowledge!

Social

Celebrate 529 Day by

shaping a bright future!

Explore our module on

contributions. Log in, gain

valuable insights and take

control of their educational

maximizing 529

future.

for their educational

success!

in their bright future!

**Hashtags** 

#InvestInEducation

#EduationalSuccess

#EducationalSavings

#BrightFuture

#529Day

# JUNE: NATIONAL HOMEOWNERS MONTH

Module Suggestions: Owning a Home Playlist (All)

**Graphics** 





#### **Email Copy**

**Subject Line:** Unlock Your Homeownership Confidence!

No matter where you are in your homebuying journey, you want to know you're making the best choice possible for you and your family. For National Homeowners Month, we are here to support you with exclusive e-learning curated just for our customers. Whether you're considering buying, evaluating homeownership or looking to refinance, this playlist is your comprehensive guide to making informed decisions.

Explore the Owning a Home Playlist:

- Buying a Home: Unlock the secrets to a successful home purchase. From house hunting to making an offer, we've got you covered.
- Evaluating Homeownership: How do you know if homeownership is right for you? Learn the key considerations and make informed decisions about this significant investment.
- Understanding Mortgages: Navigate the mortgage landscape with confidence. Explore the various types of mortgages and find the ones that suite your financial goals.
- Refinancing Strategies: Ready to optimize your mortgage? Get the latest on refinancing options, understanding the process and discover if a refinance can work to your advantage.

Get started today by logging on (INSERT LINK TO JOIN) and take control of your homeownership journey. Your dream home awaits!

Social	Social	Social	Social	Hashtags
Happy National Homeowners Month! From buying to refinancing, we've got the tools your need for a successful and knowledgeable homeownership journey. Check out our exclusive "Owning a Home" playlist today!	Dreaming about homeownership? This National Homeowners Month, explore our elearning playlist, "Owning a Home". You'll be prepared to make informed decisions about if homeownership is right for you and what type of mortgage would work best for your unique needs. Get started today!	Time for a mortgage check-up? With our Owning a Home playlist, you'll quickly learn if your mortgage is working for you and what options are available for you if it is time for a change.	Your dream home is within reach! Explore our e-learning playlist, Owning a Home, this National Homeowners Month. Log in, get informed and take the first step toward homeownership success!	#NationalHomeownersMonth #HomeownershipJourney #MortgageWisdom #RefinanceSmart #DreamHome

# **JUNE 30: FAFSA DEADLINE**

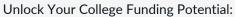
#### Module Suggestions: Paying for College, Understanding Your Student Loans

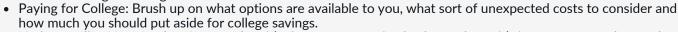
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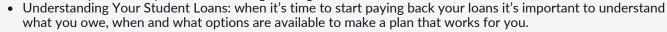


Subject Line: Don't Miss Out! June 30th FAFSA Deadline Approaching - Boost Your College Funding IQ!

Time is ticking! As we approach the June 30th FAFSA deadline, (FINANCIAL INSTITUTION) is here to ensure you make the most of your college funding opportunities. We know how much there is to as you plan to send your student off to college, even if that date is still years down the road. Let us help ease some of the burden with our quick courses on paying for college and understanding student loans.







Seize every opportunity to fund your college plans while this deadline is top of mind. Get started today by logging on (INSERT LINK TO JOIN)!





Social	Social	Social	Social	Hashtags
Time is running out! Our e-learning modules on paying for college and understanding student loans will help you sort through your options. Boost your college funding IQ before the June 30th FAFSA deadline!	Seize the opportunity! Celebrate the journey to higher education with our e-learning modules. Log in and explore creative ways to fund college. Your brighter future awaits!	Last call for college funding wisdom! Explore our modules on student loans and paying for college. Log in before the June 30th FAFSA deadline and make educated choices for your educational journey!	Tick-tock! The June 30th FAFSA deadline is near. Dive into our modules and equip yourself with the knowledge to navigate student loans and college funding. Log in now and sail towards educational success!	#FAFSADeadline #SetSailToSuccess #CollegeWisdom #BrighterFuture #EducationalSuccess

# **JULY 1: NATIONAL FINANCIAL FREEDOM DAY**

Module Suggestions: Healthy Financial Habits, Getting Started with Investing, Generational Wealth Strategies

Graphics	Email Copy
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**Subject Line:** Declare Your Financial Independence: Embrace National Financial Freedom Day!

Happy National Financial Freedom Day! On this special day, (INSTITUTION NAME), invites you to embark on a journey toward financial independence.

Unlock Your Financial Freedom Toolkit:

Explore our self-paced modules designed for your financial success:

- Healthy Financial Habits: Cultivate a strong financial foundation with practical tips to help you gain clarity on how you can give your daily financial choices a healthy infusion.
- Getting Started with Investing: Take your first steps into the world of investing. Learn the basics, understand the types of investments available and their comparative risks.
- Generational Wealth Strategies: Secure a legacy for your loved ones. Learn strategies to help you build, transfer and maintain wealth for future generations.

This Financial Freedom Day, declare your financial independence with knowledge as your ally.

Get started today by logging on (INSERT LINK TO JOIN). Wishing you a financially liberated journey!





Social	Social	Social	Social	Hashtags
Plant the seeds of financial independence! Celebrate National Financial Freedom Day with our modules on Healthy Financial Habits. Log in, cultivate your financial garden and watch your wealth grow!	Ready to take control of your financial destiny? This National Financial Freedom Day, explore our modules on Getting Started with Investing. Log in, learn and set the stage for a wealth building journey!	Secure your legacy, embrace financial freedom! Dive into our Generational Wealth Strategies module this National Financial Freedom Day. Log in and empower your family with a lasting financial impact.	Launch your journey to financial independence! This National Financial Freedom Day explore our modules and gain insights into healthy financial habits, investing and generational wealth. Log in and soar towards a liberated financial future!	#FinancialFreedomMonth #GenerationalWealth #FinancialFreedomJourney #FinancialIndependence

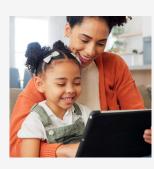
# JULY: NATIONAL MAKE A DIFFERENCE TO A CHILD MONTH

Module Suggestions: Family Conversations About Money, Teaching Kids to Budget, Budgeting for Families

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**Graphics** 





#### **Email Copy**

Subject Line: Spark Financial Conversations with Your Whole Family!

At (FINANCIAL INSTITUTION), we believe in empowering families to achieve financial well-being. That's why we offer a variety of resources, including our valuable e-learning modules.

In celebration of National Make a Difference to a Child Month, we'd like to encourage you to spend time with the children in your life having crucial conversations about finances early and often. We know these conversations can sometimes be confusing to navigate and it can be hard to know what is developmentally appropriate. To help alleviate that stress and provide you with guidance, we have several learning modules curated for you.

- Family Conversations About Money: Discover appropriate conversations about money that can include children, partners, grandparents and even extended family.
- Teaching Kids to Budget: This session is full of activities and techniques to help kids get comfortable with managing money, building the habit of saving and spending wisely.
- Budgeting for Families: Identify opportunities to include family financial conversations in daily life and explain the importance of goal setting.

Our e-learning modules are a valuable resource for families of all ages, sizes and shapes. We encourage you to explore them and discover how they can help you build a brighter financial future for yourself and your loved ones. Get started today by logging on (INSERT LINK TO JOIN) and make a difference today.

Social	Social	Social	Social	Hashtags
Celebrate National Make a Difference to a Child Month by building a strong financial foundation! Explore our modules on family conversations, teaching kids to budget and budgeting for families.	Happy Make a Difference to a Child Month! Invest in your family's financial well- being with our modules. Log in and start the conversation about money, teach kids to budget and build a family budget.	Learning is empowering! Dive into our sessions this Make a Difference to a Child Month. Log in, learn, have great conversations and set your family up for financial success!	Be a financial role model! Explore our e- learning modules and discover how family conversations about money can build a brighter financial future for your whole family.	#EmpowerYourFamily #RoleModel #FamilyFinances #MakeADifferenceTo AChildMonth #FinancialFutureBuild ers

## **AUGUST 5: COMMERCE DAY**

### **Module Suggestions: Investor Education Playlist**

# Graphics Email Copy



**Subject Line:** Unlock Your Financial Potential in 2024: Take Charge of Your Financial Wellness!

Commerce Day is here and what better way to celebrate than by investing in your financial future! At (FINANCIAL INSTITUTION) we're committed to helping you achieve your financial goals and we want you to be empowered to invest without fear.

Invest Confidently:

- Introduction to the Stock Market: Do more than just watch those stock tickers move up and down on a graph, understand what makes them move and explore trading methods you can use.
- Compound Growth and the Time Value of Money: Create realistic savings and retirement goals using the right financial tools and unlocking the power of compound growth.
- Intro to Blockchain, Crypto and NFTs: Learn how blockchain technology is used in crypto mining and trading cryptocurrencies and NFTs- and how it may disrupt other business and government operations.

These modules are your key to unlocking new opportunities and navigating the ever-changing world of commerce. Get started today by logging on (INSERT LINK TO JOIN).





Social	Social	Social	Social	Hashtags
Ready to invest in your financial future? Explore our module to get started investing and delve into the stock market. Log in and kickstart your journey to financial success.	Commerce Day is here! Enroll in our modules to demystify blockchain, crypto, NFTs and more. Log in now and discover the future of commerce.	Unleash the power of compound interest! Learn how to grow your money when you learn about the time value of money in our e-learning portal.	Curious about NFTs and the what exactly these digital assets are? Check out our leaning modules and get up to speed with some of the newest ways of investing.	#CommerceDay #FinancialLiteracy #Cryptocurrency #Investing #FinancialWisdom

# **AUGUST 14: NATIONAL FINANCIAL AWARENESS DAY**

Module Suggestions: Car Loans, Build Better Credit, Mobile and Online Banking

#### Graphics Email Copy



Subject Line: Elevate Your Financial IQ: Embrace National Financial Awareness Day!

Happy National Financial Awareness Day! At (INSTITUTION NAME), we know your financial journey is as unique as you are and we invite you to embrace financial self-discovery through our e-learning modules. Tailored to resonate with your personal financial aspirations, these modules delve into crucial aspects shaping your financial narrative.

Ignite Your Financial Insight:

- Car Loans Unveiled: Your dream vehicle is more than a mode of transportation- it's a symbol of your journey. Discover the ins and outs of car loans ensuring every drive aligns with your financial goals.
- Build Better Credit: Your credit score is the cornerstone of your financial landscape. Unlock the secrets to building a robust credit profile, paying the way for better opportunities and a brighter financial future.
- Digital Banking Mastery: In a world on the go your finances should be too. Navigate the digital banking realm with confidence as you explore the functionalities of mobile and online banking unleash the convenience that aligns with your dynamic lifestyle.

Celebrate this day not just as a spectator but as an active participant in your financial story. These modules aren't just lessons, they are your key to self-discovery and financial empowerment. Get started today by logging on (INSERT LINK TO JOIN) and take control of your financial future!





Social	Social	Social	Social	Hashtags
Uncover your financial potential this National Financial Awareness Day! Dive into modules crafted to resonate with your unique journey. Log in and set the stage for a personalized financial empowerment journey!	Every dream drive starts with informed decisions. This National Financial Awareness Day, explore the ins and outs of car loans. Log in now, gain insights and ensure your next drive aligns seamlessly with your financial aspirations.	Elevate your credit profile, elevate your opportunities! Celebrate National Financial Awareness Day by unlocking the secrets to building better credit. Log in and pave the way for a brighter financial future.	Celebrate your financial story this National Financial Awareness Day! Immerse yourself in modules that resonate with your aspirations. Log in and make this day about discovering and empowering your unique financial journey.	#FinancialEmpowermentJourney #DiscoverYourWealth #DreamDrive #CreditElevation #DigitalFinance #DiscoverYourStory #TakeChargeNow

**Graphics** 

# **SEPTEMBER: COLLEGE SAVINGS MONTH**

#### Module Suggestions: Financing Higher Education Playlist





#### **Email Copy**

**Subject Line:** Secure Their Dreams: Unleash Financial Freedom During College Savings Month!

Embark on a journey of hope and financial empowerment this College Savings Month! At (INSTITUTION NAME), we understand the dreams you have for your loved ones. That's why we're thrilled to introduce a curated playlist of self-paced learning modules designed to navigate the landscape of financing higher education.

Elevate your College Savings Journey:

Financing Higher Education Playlist: Dive into your exclusive playlist tailed for College Savings Month! It's more than just modules; it's a roadmap to securing your dreams and empowering your family's future.

Playlist Highlights:

- Budget Hacks for College: Build your best budget for all the twists and turns of higher education.
- Financial Decisions for Your Career Path: College is a big investment of time and money. Walk away with tools to understand if you're investing in a career that will work for you as hard as you work for it.
- Paying for College: Create a list of options available for you, understand the pros and cons of each and maximize the amount of student aid you qualify for.
- And more!

Get started today by logging on (INSERT LINK TO JOIN). Celebrate this College Savings Month not just with dreams but with a tangible plan.

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Ignite the dreams, secure the future! Get started with our College Savings Month playlist. Log in and unleash the power of financial freedom for your child's education.	College dreams are within reach! Explore our playlist for College Savings Month. Log in now, discover smart saving strategies and pave the way for a debt-smart future.	Choosing a major is confusing enough. Demystify budgeting and spending for college Savings Month playlist. Log in now to plan your path to a fulfilling career!	Dreaming of college? This College Savings Month, explore our playlist on financing higher education. Log in, unravel strategies and invest in a bight future.	#CollegeDreamsUnleashed #FinancialFreedomJourney #BrightFuture #CareerPlanning

**Graphics** 

# **SEPTEMBER 6: NATIONAL 401(K) DAY**

Module Suggestions: 401(k) Plans, Managing Your 401(k)

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**Subject Line:** Secure Your Tomorrow: National 401(k) Day Exclusive Modules Await You!

Happy National 401(k) Day! To celebrate this day dedicated to retirement planning we're sharing our best learning modules tailored exclusively to 401(k)s! Pssst: Have other retirement savings or curious what other options are out there? We've got you covered on that, too. Just log in and start exploring.

- 401(k) Plans: Learn how to fund a 401(k) plan, limits and determine your savings.
- Managing Your 401(k): Maximize your savings through contributions, investments and rebalancing. Unsure if you should tackle this yourself or work with a pro? Through this course you'll better understand which of those options best fits you and your goals.

Retirement planning isn't just about numbers, it's about securing the life you've always envisioned. These modules aren't just lessons, they are your key to unlocking a future filled with financial freedom and peace of mind.

Get started today by logging on (INSERT LINK TO JOIN).



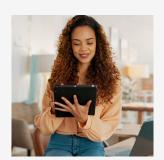


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Happy National 401(k) Day! Elevate your retirement planning with our modules covering everything you need to feel confident in managing your 401(k). Log in and learn for a financially secure future.	Your retirement, your rules! Join us to learn if your 401(k) plan is aligned to your personal savings and investing goals.	Your roadmap to retirement success! Dive into our National 401(k) Day modules to learn how to manage your 401(k) and embark on a journey towards a secure retirement.	It's National 401(k) Day and your retirement dreams are the stars! Explore our exclusive modules on managing your 401(k). Log in to take the reins, and let your financial future shine bright.	#401kEmpowerment #RetirementPlanningJourney #RetirementGoalsUnlocked #FinancialDestinyControl #InvestInTomorrow

# OCTOBER: NATIONAL FINANCIAL PLANNING MONTH

#### Module Suggestions: Building Financial Resilience Playlist

**Graphics** 





#### **Email Copy**

**Subject Line:** Financial Resilience: It's Better to Have It and Not Need It Than to Need It and Not Have It!

Happy National Financial Planning Month! At (INSTITUTION NAME), we believe that every financial journey deserves resilience. As we celebrate this month dedicated to empowering your financial future no matter what life throws at you we want to offer you a suite a tools to help you feel well prepared. Build your financial emergency kit with:

- Debt Consolidation: Learn how this tool works, when it is a good fit and what to look for if you decide to work towards consolidation and debt freedom!
- Budgeting in a Crisis: Navigate uncertain times with confidence. Learn adaptive budgeting techniques to weather any storm that life may throw your way.
- Financial Emergency Planning: Life is unpredictable, but your finances don't have to be. Master the art of financial emergency planning and secure your peace of mind.

Get started today by logging on (INSERT LINK TO JOIN) and take control of your financial future through storm clouds or clear skies!

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Happy National Financial Planning Month! Strengthen your financial foundation with our educational modules helping your feel prepared for anything life throws at you. Log in and empower yourself with strategies for debt consolidation, crisis budgeting and more!	Unleash your financial resilience! Log in to our debt consolidation module to break free from financial stress and set the stage for a debt-free future.	Budgeting in a crisis made simple! Celebrate National Financial Planning Month with our adaptive budgeting module. Log in to equip yourself with essential skills and navigate life's uncertainties with confidence.	Fill your financial emergency kit with everything you need to be prepared for all of life's financial "whatif's". Log in to learn how to create a crisis budget, plan for financial emergencies and explore debt management techniques.	#ResilientFinances #FinancialEmpowerment #AdaptiveBudgeting #FinancialStrength #EmergencyFund

# **OCTOBER 17: GET SMART ABOUT CREDIT DAY**

Module Suggestions: Credit Scores and Reports, Credit Cards, Build Better Credit, Preventing Bankruptcy

Graphics	





#### **Email Copy**

**Subject Line:** Get Smart About Credit Day is Here: Use Your Credit Building Toolkit Today!

Happy "Get Smart About Credit Day"! Credit is a cornerstone of your financial health and today we're offering you a tailored toolkit to build your credit score to the level you need to succeed.

Explore Your Path to Credit Happiness:

- Credit Scores and Reports Decoded: Unveil the mysteries behind credit scores and reports. Empower yourself with insights that can shape a stronger financial future.
- Credit Cards Offers: The good, the bad, the ugly. Learn to make sense of the credit offers you get in store, in the mail and in your inbox.
- Build Better Credit Blueprint: Elevate your credit profile. Discover actionable steps to build better credit.
- Preventing Bankruptcy due to Medical Debt: Medical debt can pile up and feel overwhelming. Learn your options and strategies to deal with unplanned medical debt and how to avoid filing for bankruptcy.

Get started today by logging on (INSERT LINK TO JOIN) and take control of your financial future!

Social	Social	Social	Social	Hashtags
Happy Get Smart About Credit Day! Elevate your credit knowledge with our modules tailored to your credit health. Log in today to start building your credit toolkit.	Unveil the mysteries of your credit! Using our credit scores and reports module you'll empower yourself with insights and pave the way for a stronger financial future.	Are you a confident credit card consumer? Celebrate Get Smart About Credit Day with a module all about the ins and outs of developing your credit card savvy. Log in today!	Medical debt can pile up unexpectedly. If you find yourself in this position, you are not alone. Take a few minutes to understand your options for handling medical debt and strategies for avoiding bankruptcy!	#CreditSmartJourney #FinancialEmpowerment #CreditInsights #SmartCreditCardUSage #BuildBetterCredit

**Graphics** 

# **NOVEMBER: NATIONAL FAMILY CAREGIVER MONTH**

Module Suggestions: Financial Caregiving Playlist Options

#### **Email Copy**



**Subject Line:** Financial Caregiving: What You Can Do Today to Help Tomorrow

In honor of National Family Caregiver Month, (INSTITUTION NAME), extends heartfelt gratitude to those who selflessly provide care and support to their loved ones. As part of our commitment to your well-being, we're introducing learning modules to guide you in the financial aspects of caregiving whether you're serving that role today or may in the future.

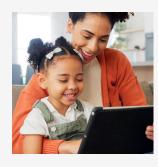
Navigating the Role of Financial Caregiver:

- Becoming a Financial Caregiver: Explore the essentials to becoming a financial caregiver. You will begin to recognize expectations, procedures and common documents you may encounter in this role.
- Expectations for a Financial Caregiver: In this position you're asked to do more than simply execute tasks, you'll need to understand the emotional, physical and mental traits needed to excel.
- Managing Finances Through the Loss of a Loved One: Develop a plan of action to help navigate finances after the loss of a loved one.
- Preventing and Recognizing Elder Financial Abuse: Identify common signs of elder financial abuse and learn what you can do to help prevent and report any suspect abuse.



Being a financial caregiver isn't just about responsibilities, it's about securing the financial well-being of those you care for. These modules are your toolkit for navigating the complexities of caregiving with confidence and compassion.

Get started today by logging on (INSERT LINK TO JOIN).



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National Family Caregiver Month calls for empowerment! Use our newest modules to explore the responsibilities that come with financial caregiving and set yourself, and your loved one, up for success!	Managing loss is challenging for everyone. For the financial caregiver, the burden can feel overwhelming. Prepare a plan so you know what to expect in your time of greatest need. Start today.	Your toolkit for caregiving confidence! Dive into our National Family Caregiver Month modules to navigate with confidence.	Uncover the expectations of a financial caregiver! Log in now to gain valuable insights and navigate your caregiving role feeling confident and supported.	#NationalCaregiverMonth #FinancialCaregiving #PreventElderAbuse #CaregiverEmpowerment

# **NOVEMBER 25: SMALL BUSINESS SATURDAY**

Module Suggestions: Small Business Essentials and Growing Your Small Business Playlists

### Graphics Email Copy



**Subject Line:** Supporting Our Small Business Entrepreneurs All Year Long!

It's Small Business Saturday! At (INSTITUTION NAME), we celebrate the spirit and resilience of our small businesses and their owners all year but especially at this time of the year. To show our support, we're sharing our self-paced learning program for all current and aspiring small business owners. With two different playlist tracks, you'll find helpful insights no matter where you are in your business ownership journey.

#### **Small Business Essentials:**

- Developing a Business Plan: Take your idea from dream to reality. All it takes is putting it down on paper with intention. Use this course to help you understand the ins and outs of what is expected in creating your business plan.
- Financial Wellbeing for Aspiring Entrepreneurs: Owning your own business can be as challenging as it is fulfilling. Prepare mentally and evaluate the legal and tax changes you'll experience as you transition to working for yourself.
- How Businesses Obtain Credit: Explore how creditworthiness is evaluated for small businesses and identify the documentation you'll need to get started.



Get started today by logging on (INSERT LINK TO JOIN). We can't wait to visit your business!



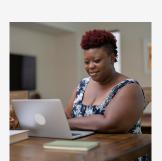


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Happy Small Business Saturday! Ignite your business dreams with our modules. Log in to explore the essentials of starting a business and fuel growth strategies.	Transform your business ideas into reality! Our Small Business Essentials playlist helps set the stage for your entrepreneurial journey from developing a business plan to obtaining credit. Get started today!	Small business with big ambitions? We got you. Check out our Growing Your Small Business playlist to learn all about customer retention, managing a team, recruiting and hiring and more. Start today, grow tomorrow!	Your toolkit for Small Business Success- Saturday and beyond! Our modules will get your starts and fuel your growth potential right from the comfort of your own home. Log in today.	#SmallBusinessSaturday #SmallBizIgnite #BusinessSuccess #StartToday #SmallBusinessBigDreams

# **DECEMBER 8: NATIONAL HEALTH SAVINGS ACCOUNT DAY**

Module Suggestions: Health Savings Accounts, Intro to Healthcare Financing, Negotiating Your Medical Bill

**Graphics** 





#### **Email Copy**

Subject Line: Maximize Your Health and Wealth: National HSA Day Content Inside!

Happy National Health Savings Account (HSA) Day! At (INSTITUTION NAME), we're passionate about your well-being. We want to ensure you're getting the most out of all aspects of your financial health- especially where that intersects with your physical and mental health and well-being. Use these curated modules to brush up on your health+finance wellness.

- Unlock the Power of Your HSA: Understand the benefits and features you should consider when deciding whether to open a Health Savings Account. Then learn how to open and use one.
- Healthcare Financing: The health insurance landscape in America can be complex. In this session you'll learn how to
  navigate health insurance and better understand the financial implications of various types and styles of insurance
  coverage.
- Negotiating Your Medical Bill: You have the power to negotiate your medical bills! Learn strategies and techniques to use when navigating your medical bill and negotiating payment after a medical hardship.

While we hope you all stay healthy and have only limited needs for healthcare, we know life happens. Use these resources to prepare yourself and become an informed health care user. Your health is priceless, and so is the ability to manage your health care costs effectively.

Get started today by logging on (INSERT LINK TO JOIN) and take control of your financial future!

Social	Social	Social	Social	Hashtags
Happy National HSA Day! Maximize your health and wealth with our modules on understanding HSAs, healthcare financing and the power of negotiating medical bills.	Unlock the power of your Health Savings Account! Join us to learn about the benefits and features of an HSA. If you decide it's right for you, we'll show you how to open and manage your new HSA.	Your guide to a healthier and wealthier future! This National HSA Day, dive into our empowering modules. Log in, elevate your HSA knowledge and celebrate a day dedicated to health and financial wellbeing.	Navigate healthcare costs with confidence! Celebrate National HSA Day with our Healthcare Financing Strategies module. Log in to explore financing options and empower your healthcare decisions.	#NationalHSADay #HealthSavingsAccount #HealthIsWealth #HSAEmpowerment

## **DECEMBER: YEAR END WRAP UP**

Module Suggestions: Taxes-Lowering Your Tax Bill, Investigating the AI Boom, Pick A Personal Finance App

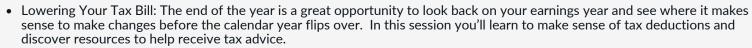
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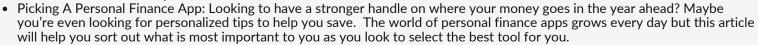


**Subject Line:** Empower Your Finances: Year-End Wrap-Up Exclusive!

As the year draws to a close, we want to celebrate your financial journey at (INSTITUTION NAME). This year has been about growth, empowerment and navigating the twists and turns of personal finance. To help you finish the year on a strong note, we're excited to release a brand new curation of end-of-year learning modules.

Reflect, Learn, Prepare for a Prosperous New Year:





• Al Boom! The term heard across the world the past year was "Al". Stay ahead in the age of artificial intelligence by exploring the Al boom and what it means for you.

Your financial journey is a continuous adventure and this year-end is the perfect time to reset, learn and prepare for an even stronger year ahead.

Get started today by logging on (INSERT LINK TO JOIN). Wishing you a joyous year-end and a financial future filled with possibilities!





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Reflect, learn and thrive! Explore our Year-End Wrap-Up modules. Log in to discover strategies to lower your tax bill, pick the perfect finance app and what is going on with AI, anyway?!	Navigate the world of personal finance apps! Celebrate your financial journey with our Picking a Personal Finance App module. Log in to learn what app might fit best for you and simplify your financial life.	Embrace the Al revolution! Explore our "Learning About the Al Boom" to understand what generative Al is, why the industry is booming and how you can use Al today. Log in to get started.	Your roadmap to financial success! This year-end, dive into our curation of modules to reflect, learn and prepare for a prosperous new year.	#EndOfYear #FinancialGrowth #YearEndWisdom #TaxSavingsStrategie s #AIRevolution #InvestInYourFuture