



Getting Started Toolkit

Employee Email / Announcement Template

Turnkey content with clear CTAs to encourage employees to participate in your new financial education program.

CONTENT

Subject line options:

New Financial Education Resource for Employees and **[Members/Customers]**

Announcing the **[Program Name]**

New Employee Benefit: **[Program Name]**

Hi **[EMPLOYEE.FIRSTNAME]**,

[Institution Name] is thrilled to introduce a new digital financial education initiative through our partnership with leading education technology innovator, EVERFI. The program provides the **[Institution Name]** community with an engaging learning experience around critical personal finance topics such as building emergency savings, mortgage education and retirement planning.

To ensure a successful launch, it's important for **[Institution Name]** employees to be the first to experience the program. This will help us all become knowledgeable ambassadors of the financial education resources we are providing for our **[members/customers]** and community.

Highlights of the program include:

EVERFI



- A series of 3-10 minute, interactive learning modules on key financial topics.
- Mobile and tablet enabled so you can learn anytime, anywhere.
- Available in English and Spanish.

Your financial well-being is important to us and we are committed to providing you with resources to manage your money. To get started, simply visit **[Microsite URL]** and complete the **Financial Planning playlist for a chance to win a \$100 gift card!**

Thank you,

[Institution Name]