



Financial Literacy Month Toolkit | @Work

Email Outreach / Newsletter Template

Turnkey content with clear CTAs to drive customers into Financial Education topics through email marketing.

CONTENT

Subject line: Time for spring cleaning (your finances)

Preview text: How to tidy up your spending and make your savings shine.

Hi **[CONTACT.FIRSTNAME]**,

Spring is finally here, which usually means plenty of work, dusting, and decluttering around the house. But what about your *financial* house?

If you're looking to tidy up, take a look at our Financial Spring Cleaning Toolkit below. These quick, interactive exercises will help you:

- Start and grow your emergency savings
- Dust off your credit report
- Evaluate your risk for identity theft
- Go paperless and streamline bill payments

[INSTITUTION NAME] Financial Spring Cleaning Kit

(See Formatting on Page 2)



Credit Scores + Reports

[DEEP LINK]



What factors affect your score?

Learn what financial events influence your credit score and what you can do to keep it healthy.

Identity Protection

[DEEP LINK]



Are your daily transactions secure?

Learn how to protect your financial information and what steps to take if you fall victim to fraud.

Mobile Payments

[DEEP LINK]



Why use mobile payments?

Learn about different mobile payment options and how they can help you stay on top of your bills.

Building Emergency Savings

[DEEP LINK]



Are you ready for "what if"?

Understand how small changes to your daily routine can add up to significant savings over time.

[CTA] Start my spring cleaning

Explore our full library of financial education topics at: everfi.InstitutionFi.com. (Or insert a custom message or CTA about your Financial Education Initiative here.)

Have questions? Feel free to reach out to us at [\[INSERT / LINK EMAIL ADDRESS\]](#) -- we're always here to help.