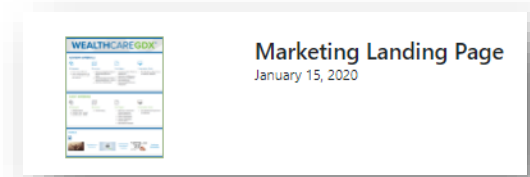


How to: Wealthcare Email Campaigns

This guide will show you how to use a Wealthcare designed email campaign on an email platform such as Act-On, Mail Chimp, Constant Contact, etc. All Wealthcare email content can be found on the [Marketing Landing Page](#).

Step 1 – Access the Marketing Landing Page clicking on the linked image to the right or Open the GDX360 Resources tab > Choose Marketing Landing Page from the Marketing section.



Step 2 – Go to Marketing Campaigns > Choose Campaign > Scroll to Email Assets > Click on Email Header Picture > Right Click > Save Image As. Then, Click on Email Copy > Right Click > Save Image As. You may also need to save them to your email platform’s Image Library.



50%? 75%? 95%?
How confident are you about meeting your financial goals?

Align your financial planning with your goals for saving, investing, and supporting your lifestyle. With our goals-driven financial planning technology, you can find your Comfort Zone[™] and feel confident in your financial growth.

How it works

Comfort Zone evaluates your financial resources alongside your goals—now and into the future. Then, it simulates 1,000 lifetimes and market scenarios, generating a score that reflects the percentage of times those goals would be met or surpassed. More than a number, your Comfort Zone score reflects how confident and comfortable you can be in your financial future.

Your Comfort Zone score empowers you to be in control and make proactive changes as your finances and goals evolve over time.

Speak with an advisor about how you can gain financial confidence and be in your Comfort Zone.

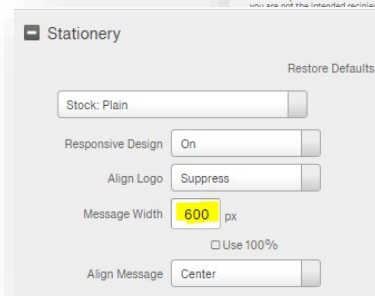
Step 3 - Sign in to your email platform of choice

Step 4 – If you have an email template created, start a new email campaign draft. If not, create an email template. We recommend templates include:

- Your logo (link your website to your logo)
- Header
- A call to action button
- Social media links
- A Wealthcare/LPL approved disclosure



We also recommend you use a stationary size of 600px for optimal mobile view.



Step 5 – Add a subject line to your campaign. Your email subject line is your first (and maybe your last) impression on users.

Subject Line

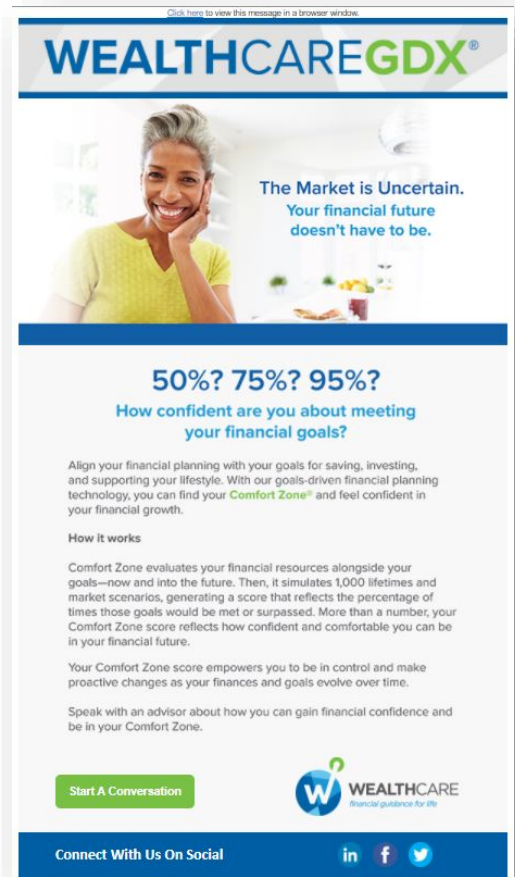
This is the subject line your recipients will see in their inbox.

The Market is Uncertain. Your financial future doesn't have to be.

Step 6 – Add your saved Email Header picture and Copy to the email. Then copy and paste the body of the email.

Step 7 – Add your marketing list (if you do not already have one saved). Make sure you add your name and email to the list so you get sent a copy when it starts circulating.

Step 8 – Schedule your campaign to be sent.



Listen to a [recording](#) of the marketing team walk you step by step through adding Wealthcare content to an email platform. The password is WCM_2021.

*****Please note...any Email you wish to send must be approved by Wealthcare and LPL compliance (if you are WCAP Hybrid) first.**