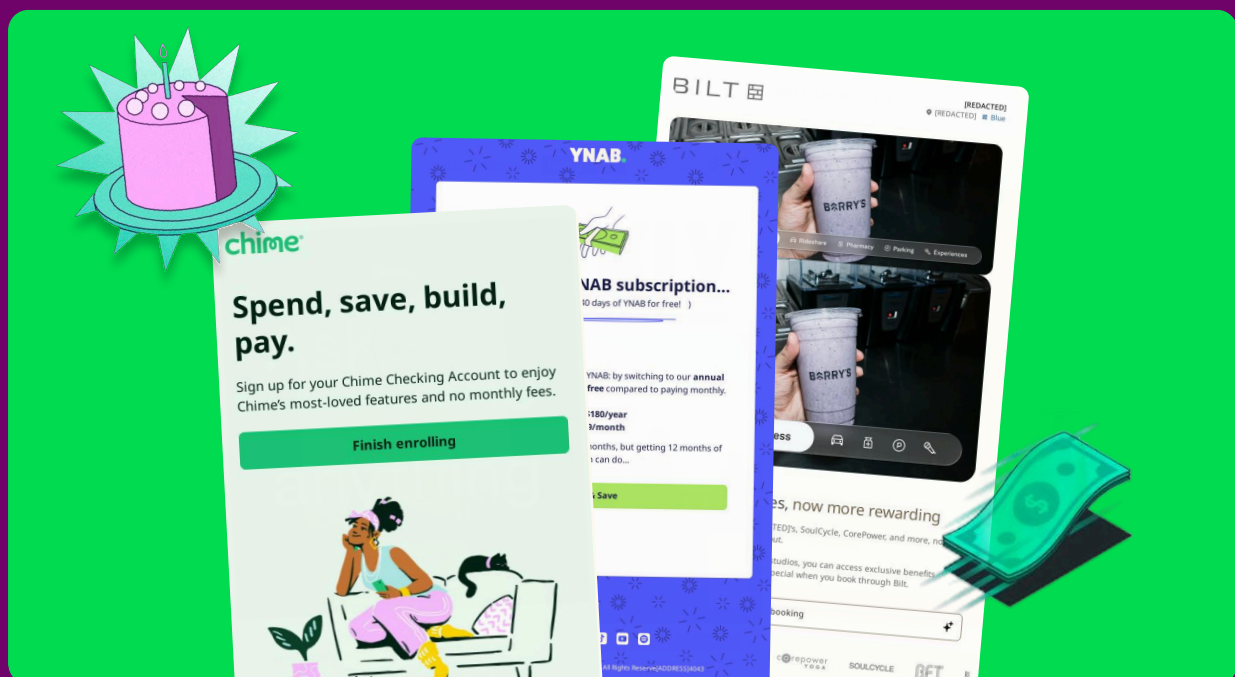


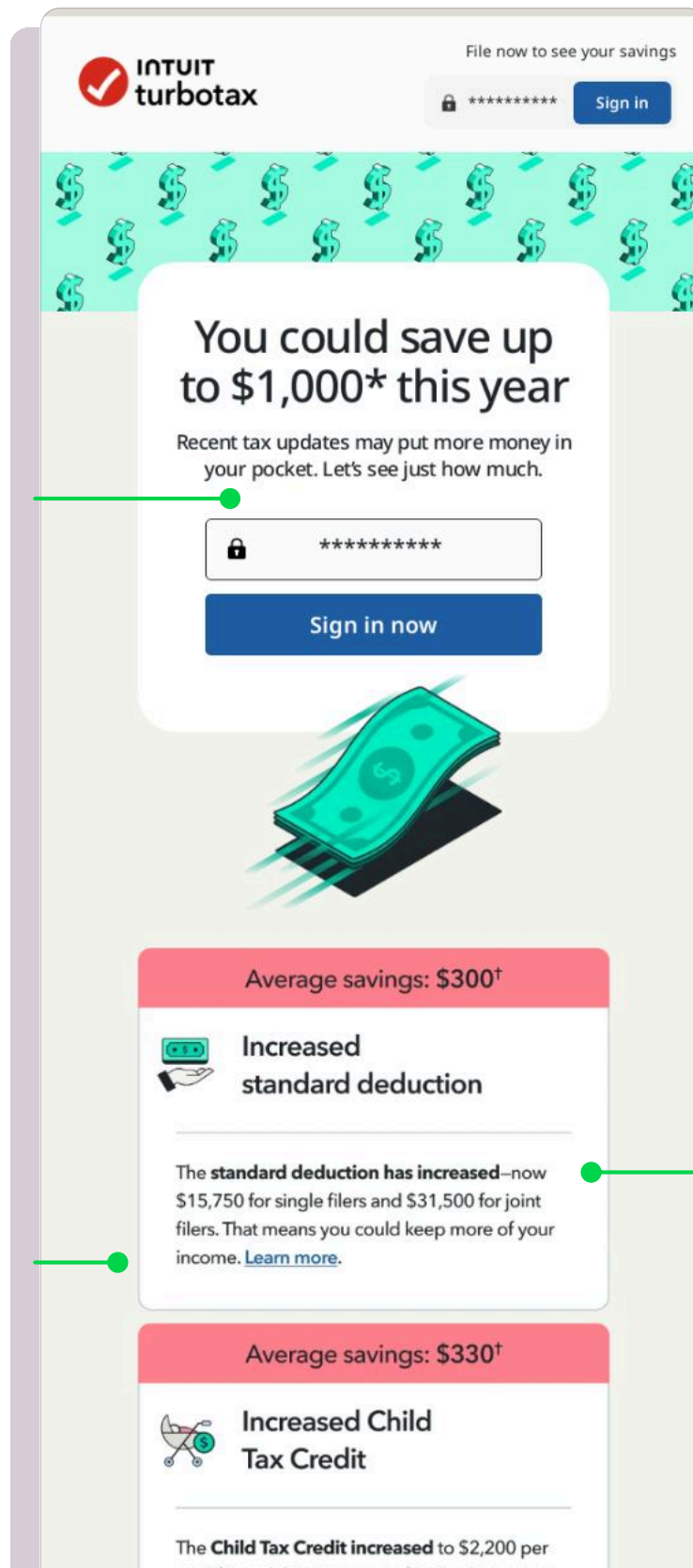
The Finance Email Lookbook

Learn the latest design trends from
leading brands in financial services



TURBOTAX CALCULATES CUSTOMER SAVINGS

WE'RE
LISTENING



The screenshot shows the Intuit TurboTax mobile app interface. At the top, the Intuit TurboTax logo is on the left, and a "File now to see your savings" link is on the right. Below the logo is a sign-in section with a password field (masked with asterisks) and a "Sign in" button. A large white overlay box in the center contains the text "You could save up to \$1,000* this year" and "Recent tax updates may put more money in your pocket. Let's see just how much." Below this is another password field and a "Sign in now" button. A green line points from the "WE'RE LISTENING" text to the top of this overlay box. Below the overlay is a 3D illustration of a stack of money. At the bottom, there are two sections with pink headers. The first section is titled "Average savings: \$300+" and features an icon of a hand holding a coin. It contains the text "Increased standard deduction" and a paragraph stating "The **standard deduction** has increased—now \$15,750 for single filers and \$31,500 for joint filers. That means you could keep more of your income. [Learn more.](#)" A green line points from the "CLICK FOR MORE RESOURCES" text to the "Learn more" link. The second section is titled "Average savings: \$330+" and features an icon of a baby carriage. It contains the text "Increased Child Tax Credit" and a paragraph stating "The **Child Tax Credit** increased to \$2,200 per". A green line points from the "TAX NEWS TO KNOW" text to the "Increased standard deduction" section.

INTUIT
turbotax

File now to see your savings

***** Sign in

You could save up
to \$1,000* this year

Recent tax updates may put more money in
your pocket. Let's see just how much.

***** Sign in now

Average savings: \$300⁺

Increased
standard deduction

The **standard deduction** has increased—now
\$15,750 for single filers and \$31,500 for joint
filers. That means you could keep more of your
income. [Learn more.](#)

Average savings: \$330⁺

Increased Child
Tax Credit

The **Child Tax Credit** increased to \$2,200 per

CLICK
FOR MORE
RESOURCES

TAX NEWS
TO KNOW

01

Best Educational Content

It's important for financial services to be educational and entertaining in the inbox.

Both TurboTax and H&R Block empower their customers with relevant content:

- Updates with time-sensitive news
- 1:1 assistance from experts

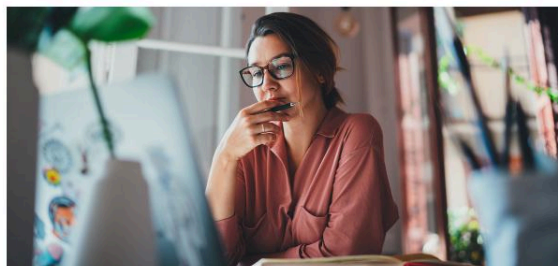
H&R BLOCK BUILDS FINANCIAL CONFIDENCE

VALUABLE
CONTENT FOR
CUSTOMERS

[Schedule a consultation](#)

BUILDING[NAME]'S FINANCIAL CONFIDENCE

Block by Block



8 common audit triggers

And the proof you'll need to get right with the IRS.

We help you navigate every step of your return even after you file. A notice from the IRS doesn't necessarily mean you did anything wrong. It just means the IRS wants to look more closely at part of your return.

[Read the 8 triggers](#)

Did you receive an IRS notice?

[Schedule a consultation >](#)

SPECIALIZED HELP
IS ON THE WAY

LENDINGTREE CONVERTS LOAN OFFERS IN A FEW CLICKS

GET ON A
FIRST NAME
BASIS

lendingtree

Get your June rates.

[NAME], you're a few clicks
away from instant loan
offers.*



Confirm your loan amount to continue:

\$5,000

\$10,000

\$15,000

\$20,000

\$30,000

SUBTLY
GAMIFIED
CTA

[Did something change? Update your loan requirements](#)

Don't take our word for it

See why thousands of people [choose LendingTree](#).

“The process was fast & easy! Just when I didn't know what I was going to do, LendingTree saved the day.”
- [NAME]

“The customer service has been outstanding! All of the instructions were easy to follow and the loan was completed in a quick and efficient manner.”
- [NAME]

“Site was easy to navigate. Filled out the information and got a response quickly with the available offers.”
- [NAME]

PLENTY OF
SOCIAL
PROOF

Download the LendingTree Spring app

Get free credit monitoring, personalized
insights and smart ideas to grow your money.



*If you've saved your information with LendingTree you can get new offers in 1-click. In order to provide you with an expedited loan process, we are submitting some of your personally-identified information to our network of lenders which may include Name, Address, Phone, Home Ownership Status, Income, Employment Status, Date of Birth and Loan Purpose.

By clicking any of the blue buttons with dollar amounts above, I understand and agree to the following terms and conditions:

I provide my express written consent to receive calls and text messages, including for marketing purposes, from LendingTree, LendingTree's [Network Partners](#), members of LendingTree's Extended Network, and any authorized third party calling or texting on behalf of LendingTree or its [Network Partners](#) or [Extended Network](#) including calls and texts

02

Best Abandonment Alert

Banking and lending are more complex than shopping for a new pair of shoes.

Complete conversions like Chime and LendingTree:

- Motivate users to take action
- Simplify the enrollment process

CHIME MAKES SIGNING UP A SNAP

FRIENDLY
ILLUSTRATION
WITH PLAYFUL
COLOR PALETTE



Spend, save, build, pay.

Sign up for your Chime Checking Account to enjoy Chime's most-loved features and no monthly fees.

Finish enrolling

CTA THAT
KEEPS
IT SIMPLE



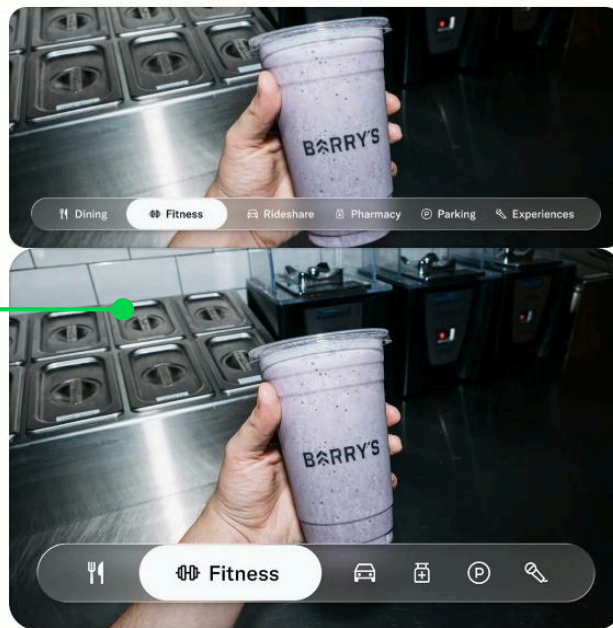
from Chime
Questions? We're here to [help](#).

BILT GIVES GYM-GOERS MORE WAYS TO TREAT THEMSELVES

APP-LIKE
IMAGERY

BILT

[REDACTED]
[REDACTED] Blue



Your favorite classes, now more rewarding

Your go-to fitness studios, [REDACTED]'s, SoulCycle, CorePower, and more, now offer more than just a great workout.

With access to over 5,000 partner studios, you can access exclusive benefits designed to make every visit feel special when you book through Bilt.

Ask the concierge to set up your booking



Make your workouts even more rewarding

Complimentary Items

Enjoy free add-ons at each studio, like a Fuel Bar shake at [REDACTED]'s or shoe rental at SoulCycle



Treat yourself to a free Fuel Bar shake at [REDACTED]'s

\$12 VALUE



Shoe rental and water bottles at Soulcycle are on us

\$9 VALUE



Enjoy complimentary boxing glove rentals at Rumble

\$5 VALUE

WHITE-GLOVE
SERVICE

DON'T MIND
IF I DO

03

Best Offer

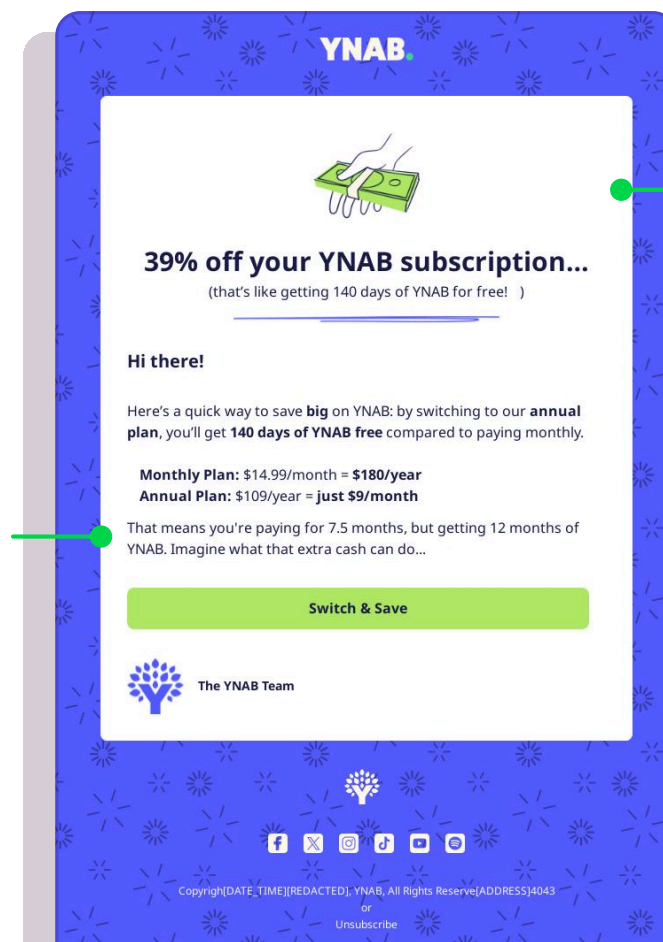
Contrary to popular belief, 'mo money should mean fewer problems.

Send email promotions that are relatable and customer-focused like Bilt and YNAB:

- Fresh, modern design to draw eyeballs toward deals
- Content that spells out the value
- Make users feel like VIPs to keep them coming back for more

YNAB CONVINCES SUBSCRIBERS TO SAVE BIG

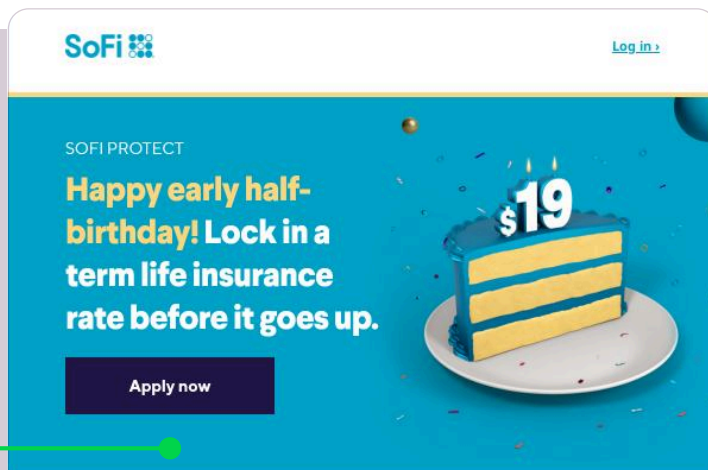
AN OFFER
THEY CAN'T
REFUSE



DESIGN THAT
FEELS DOWN
TO EARTH

SOFI COMMITS TO THE HALF-BIRTHDAY BIT

EASY APPLY
ABOVE THE
"FOLD"



SoFi  [Log in](#)

SOFI PROTECT

Happy early half-birthday! Lock in a term life insurance rate before it goes up.

[Apply now](#)

Hi [NAME]

Happy half-birthday!

Yes, we're really doing this. But hear us out: **life insurers typically use your nearest birthday to set rates, so you have about 5 days before yours could go up.** Lock in today's rate while it's still on the table. (Suddenly the half-birthday email makes sense, right?)

Term life insurance is also a great way to [supplement your employer's coverage](#) as their payout probably can't cover major expenses—like the mortgage.

We've partnered with Ladder to help make getting **coverage easy, affordable, and tailored to your life** today.

[Get free quote now](#)

Here's what to know:

- Term life insurance policies **starts at just \$19/month¹**
- **Choose between 10–30 year terms**, with coverage up to \$8M on most products.
- [Apply 100% online](#), in minutes.
- **No medical exam or doctor's exams** needed for coverage up to \$3M.²
- Get help only if you want it—**agents are available, but never required.**

NO-PRESSURE
ASSISTANCE

Your half-birthday is the perfect moment to check this off your list—and [lock in a monthly rate that won't change as you get older.](#)

LAUGH-OUT-LOUD
COPY

04

Best Birthday Promotion

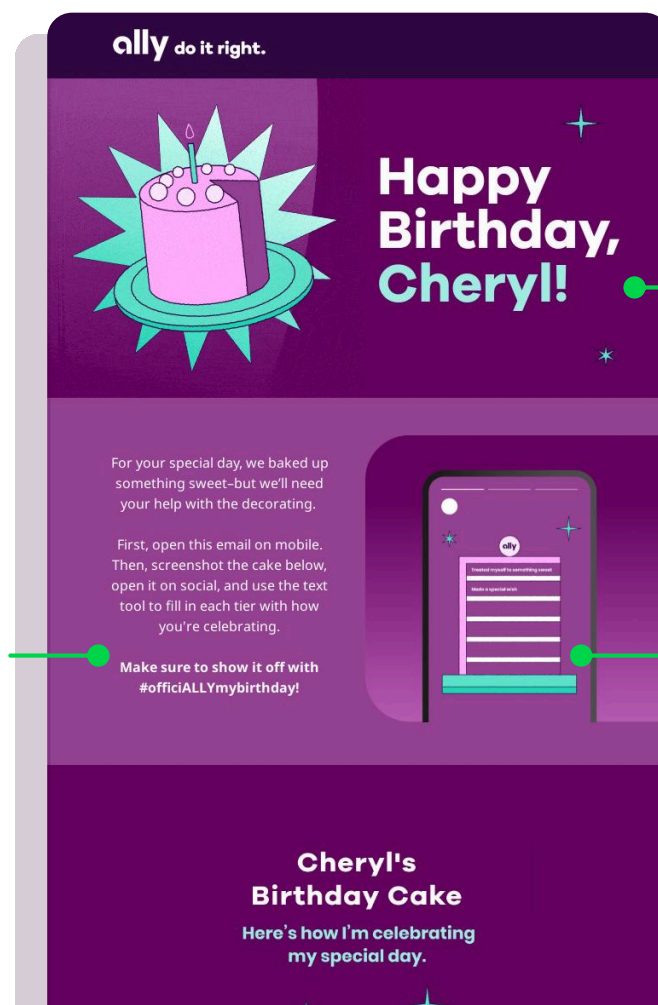
Just because finance is serious business doesn't mean institutions can't have fun.

SoFi and Ally show how to celebrate in style:

- Acknowledge milestones in meaningful ways
- Don't be afraid to show some personality

ALLY BAKES UP BIRTHDAY SWEETNESS

CUSTOM
HASHTAG TO
GET THE PARTY
STARTED



PERSONALIZATION
THAT POPS

INTERACTIVE
CELEBRATION

See what's really happening in the inbox

Discover how Inbox Monster's email deliverability and creative rendering platform will transform your pre- and post-send workflow.

- Catch deliverability problems before they hit your revenue.
- Get real-time alerts and insights to keep your emails out of the spam folder across every major mailbox provider.
- See how your email looks (and works) everywhere.
- Spot dark mode fails, broken links and accessibility gaps before you hit send.

