
Win the Moment

Infographic Series Campaign Playbook



Campaign Overview:

The intention behind the infographic series is to provide timely, relevant, content to members across a variety of demographics and situations. The topics are based on forecasting annual trending topics inclusive of where the current socio-economic landscape is taking us today. All elements are meant to stimulate interest in connecting and engaging with their credit union financial advisor.

Campaign Goal:

Drive Action and Engagement:

The series will create advisor awareness, demonstrate empathy and expertise, with content specific to services and solutions offered through the CBSI program. Secondly it will drive conversations between members and advisors with the opportunity to uncover new business sales and increase member-based penetration.

Exploit SEO opportunities:

Providing credit unions and their advisors with this material to publish on various digital platforms helps with their search engine optimization (credibility with the search engines) reinforcing their platforms' voice are in tune with visitor's needs. By recommending a release of 2 topics per month, the fresh content also shows engines the site is developing new content.

Campaign Theme:

Campaign messaging emphasizes that credit unions/credit union financial advisors are right in members' neighborhoods/backyards. As such, credit union advisors know members' surroundings/communities and can reliably help members navigate their personal journeys, from Point A to Point Z.

Target Audience:

Though the information may be relevant to a broad base of Credit Union members, a focus on those with \$100-\$500k in investable assets is optimal.

Campaign Length:

It is recommended that each infographic campaign can stay live for a 2-week timeframe between August and December.

Campaign Marketing Material Details

All campaign materials:

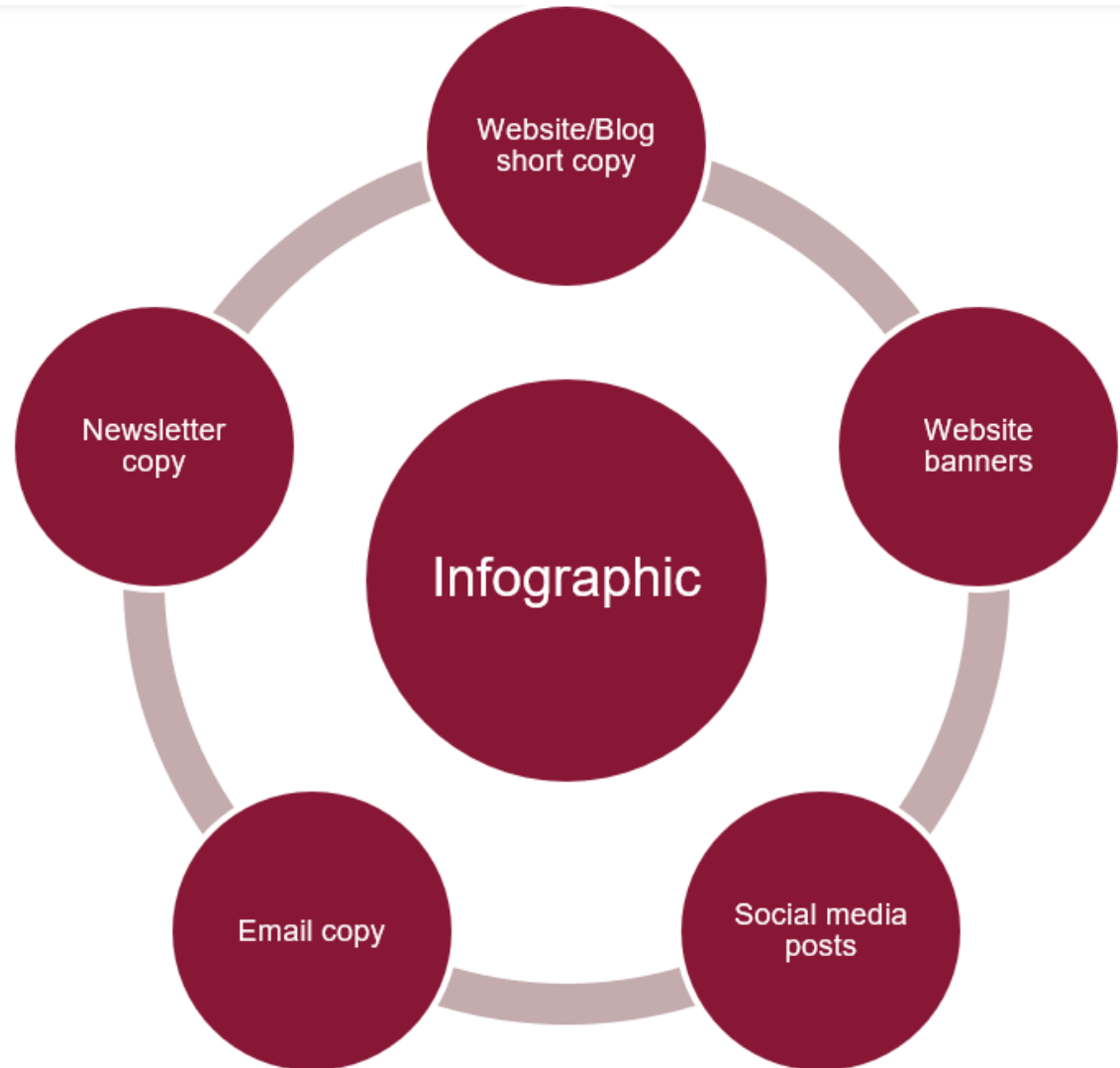
- calls to action can drive activity to a specific advisor or generic wealth management page on the Credit Union website.
- can be executed by the Credit Union marketing department or individually by financial advisors.



Campaign Elements:

To meet members where they are in the digital ecosystem, there are a variety of digital deliverables made available for each topic:

- Infographic PDF and SVG
 - General version with campaign branding
 - Custom version for credit union branding available through Marketing Port
- Website/Blog short copy
- Website banners
- Social media posts
 - credit union use: LinkedIn or Facebook recommended
 - advisor use: LinkedIn only
- Email copy
- Newsletter copy



Sample Campaign Deliverables Overview:

Diversification Deliverables

infographic

5 INVESTMENT STRATEGIES DURING TIMES OF UNCERTAINTY

Many investors watched in disbelief as markets plummeted as a result of the global pandemic, leading to heavy volatility. These shifts? There are many reasons to be worried from a market direction, often how to protect your portfolio and help you plan for the future, the market has experienced that before many times.

Here are some practical investment tips to consider.

DIVERSIFY
 Putting too many eggs in one basket may risk having them all of something goes wrong. The same holds true when investing in the market. It's important to spread funds to a variety of investment options so that when one investment goes down, others may go up. Consider spreading through domestic and international stocks and bonds, annuities, savings and other investments may help stabilize your portfolio.

LOOK FOR SOLID PERFORMERS
 When markets dip, it's tempting to give into fear and cut your losses, however, that may be the right time to invest and strengthen your investment portfolio. Research high-quality companies that have stood the test of time. Focus on the company's quality and the stock's liquidity, such as consumer staples, may be more likely to weather the downturn and the recovery. But remember, avoid speculation.

KEEP SAVINGS ON HAND
 Regularly contributing to an emergency fund is a good habit to get into no matter how the market performs. Ideally, an emergency fund can cover three to six months' bills and can be used to invest all cash or money market will protect against loss. There's also little opportunity for growth, however, knowing that a portion of your funds is accessible at a moment's notice certainly has its appeal.

STAY INVESTED DURING DOWN MARKETS
 Many investors have been drawn to value, allowing investors to take advantage of "buy" prices that weren't available with records. Despite recent fluctuations, ability to find a stock that has long-term potential, since the economy recovers. Even if you don't have a lot to invest right now, consider dollar-cost averaging, a strategy that involves buying investment shares incrementally over time.

REMEMBER THE PAST WHILE LOOKING TO THE FUTURE
 History is a wonderful teacher. In October 2008, markets plunged about 50% within a single week. By the end of 2010, they rebounded. These losses and subsequent gains teach us about the future. They remind us that markets are always going to fluctuate. The key is to make how long a necessary trade-off, but overall market performance in the months and years following economic transitions may vary. It's important to focus on your long-term investing horizon and, if you are able, stay invested in the proven strategies to manage your investments.

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Newsletter and blog

5 Investment Strategies During Uncertain Times

As millions of Americans watched our economy come to a standstill and witnessed record market losses, many wondered whether their retirement savings and goals were in jeopardy. Along with you, we realize how concerning these times can be. But we also realize that it's necessary to do what we can to create stability and plan for the future, even though that future seems uncertain. We created a graphic tip sheet to help. Simply click below to get your copy

[Get the Infographic]
 CBSI-3078861.1-0520-0622

email

SUBJECT: 5 investment strategies during uncertain times

PREVIEW TEXT: Tips on how to deal with recent market volatility, no matter where you are in your retirement journey.

BODY:

Hi (First Name),

If you've felt anxious over recent world events, you're not alone. In addition to health concerns, job loss and social isolation, many Americans have watched their retirement savings take a hit as markets fell.

It's hard to feel any sense of control, but it's important to do what you can to plan for your financial future.

To help you put the current economic events into perspective and stay the course when it comes to your long-term financial goals, we created a tip sheet, *5 Investment Strategies During Times of Uncertainty*. We hope you find it useful. Just click the link below, and reach out with any questions.

[Get the Infographic!](#)

Stay well,

(Signature)

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social media

What do you do when your retirement savings take a hit? Use these tips to plan for the long haul. #investmenttips #retirementplanning

5 INVESTMENT STRATEGIES DURING TIMES OF UNCERTAINTY

Here are some practical investment tips to consider.

[ACCESS IT NOW!](#)

web banner

5 INVESTMENT STRATEGIES
 During Uncertain Times

[GET THE GUIDE](#)

Campaign Execution Details

Execution Best Practices:

After building these financial topics into your larger content strategy calendar, the following steps will assist you in executing the deliverables.

Step 1. Infographic

- Select if you want a custom file or to utilize CBSI's campaign color scheme
 - Custom file option: build and download custom PDF from Marketing Port
 - Campaign option: download PDF or SVG from website
- Upload your preferred infographic file to content management system; giving you a sharing UR

Step 2. Website/Blog short copy

- Copy and paste the blog intro paragraph at the top of page
- Embed SVG of infographic to blog page for visual component (recommended approach)
 - If preferred to use your branded element, add a download button to page
- Add proper disclosure and compliance number to bottom of page
- Test and check page
- Publish

Step 3. Website Banner

- Identify the place on your site for banner
- Download banner file
 - CBSI is providing eight (8) banner sizes based on common website design
 - 160X600, 300X250, 468X60, 728X90, 120X90, 234X60, 180X150, 370X186
- Upload to site
- Link banner to either blog (recommended) or PDF
 - Use a UTM tracking code to track the success of this medium in driving traffic to content piece
- Publish

Step 4. Social Media Posts

- Identify if you will share post on Facebook, LinkedIn or both
- Save social media post image
- Copy post text and paste into platform
 - Make sure to copy and paste all disclosure and compliance number
- Insert link to content
 - Remove pre-populated image which will automatically pull into post builder
 - Use a UTM tracking code to track the success of this medium in driving traffic to content piece (either blog or PDF)
- Add the image you saved in prior step
- Publish
- Monitor and engage with community

Step 5. Email Copy

- Identify if the advisor or credit union will send email
- Develop list of recipients
- Program email subject line, preheader, body copy and disclosure into email
- Adjust all variable information (advisor and credit union information)
- Point all hyperlinks to either blog (recommended) or PDF
 - Use a UTM tracking code to track the success of this medium in driving traffic to content piece (either blog or PDF)
- Send test email confirming design, content and links come through as expected
- Schedule email based on your credit unions preferred send time
 - Recommendation, if not identified by credit union: Tuesday, Wednesday or Thursday from 11:00 am – 1:00 pm in your respective time zone.

Step 6. Newsletter Copy

- Copy and paste newsletter copy into your design
- Link to either blog (recommended) or PDF
 - Use a UTM tracking code to track the success of this medium in driving traffic to content piece (either blog or PDF)

Campaign Launch Details:

Based on research and trends, CBSI has identified the following eight (8) topics of focus.

August

1. Theme: Diversification
2. Theme: Retiring During Uncertain Times

September

1. Theme: Life Insurance (protection)
2. Theme: 401(k) Rollover in Today's Environment

October

1. Theme: Annuities (guaranteed income)
2. Theme: Managed Money (portfolio management)

November

1. Theme: Tax Planning for 2021
2. Theme: Inheritance

