



Financial promotions

Social media
post examples

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Example financial promotions

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Example: financial promotions

This is a direct call to action trigger.

Remember a financial promotion is any client communication which is an invitation or inducement to engage in investment activity undertaken through the course of business, whether the activity is investment, pension, mortgage, protection or otherwise.

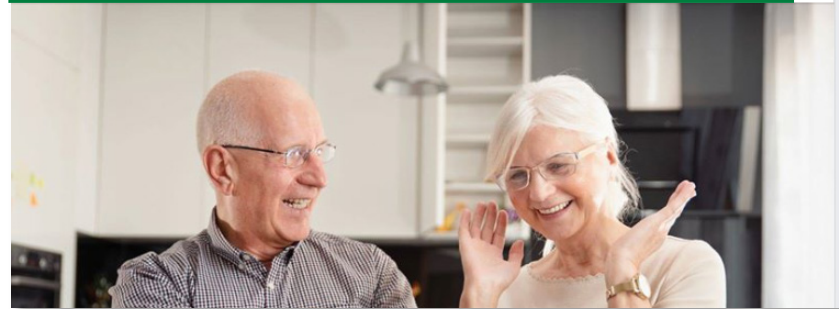
Wealth, just like your health, must be carefully preserved. Your assets need to be protected against the potential threats of erosion by taxation, the effects of inflation and investment risks. 📄

For bespoke financial advice tailored to your needs, give our friendly advisers a call on 01530 267150. 📞



A personal pension plan helps you save money for retirement and is available to any UK resident aged 16-75 📄

For more information, give one of our friendly advisers a call on 01530 267150 📞



Example: financial promotions

There are many reasons to seek financial advice on ISAs especially if you are considering taking the money out of an existing ISA and paying it into a new one. Usually the thing to do is transfer the ISA, rather than close one and open a new one. This is because you are only able to invest up to £20,000 each tax year in an ISA. So, if your existing ISA has a value greater than this, you won't be able to get the tax efficiency benefits on the amount over the £20,000.

This isn't the only reason to speak to one of our financial advisers who give advice on ISAs in Sutton Coldfield and the wider area. There may be ISAs offering a higher rate of return or lower management fees. You may want to increase or reduce your risk or start to take an income from your ISA. We have access to many more ISAs than you will get online or on the high street.

The value of pensions and investments and the income they produce can fall as well as rise. You may get back less than you invested.

Investors do not pay any personal tax on income or gains, but ISAs do pay unrecoverable tax on income from stocks and shares received by the ISA managers.

Find out more here <https://lnkd.in/ed3csc2> or get in touch.

**Don't cash in
your ISA without
getting advice!**

**We'll tell
you why.**

Talk to us.



Use of terminology and sales talk has been added to entice a customer to engage with the firm and attract business.

Non-financial promotions should remain factual to inform or educate without the prompt to encourage the recipient to respond.

A call-to-action button (e.g. contact us) is not always the trigger. Your item could also be a financial promotion if it includes:

1. An inducement – something that persuades or leads someone to do something.
2. An invitation – the action of inviting someone to do something.
3. Terminology/general sales pitch – exaggerated commendation for promotional purposes.



Example:
Non-financial
promotions

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Mortgage post – non-financial promotion

Compliant

Mark Herrington • 1st
Financial Adviser

15h • 🌐

In the ever-evolving landscape of home ownership, it's essential to stay informed about the options available. Mortgages are a significant commitment and understanding them can be the key to making the right choices for your future.

Remember, it's not just about the rates; it's about finding a mortgage that fits your life. Stay savvy, stay informed, and stay focused to make your dream of home ownership a reality. 🏠🔑

#MortgageTips #HomeOwnership #FinancialAwareness

1 comment • 1 repost

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Non-compliant

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Contact us for your free initial consultation today! ←

#MortgageTips #HomeOwnership #FinancialAwareness

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Adding a call-to-action button, turns this non-financial promotion into a financial promotion.

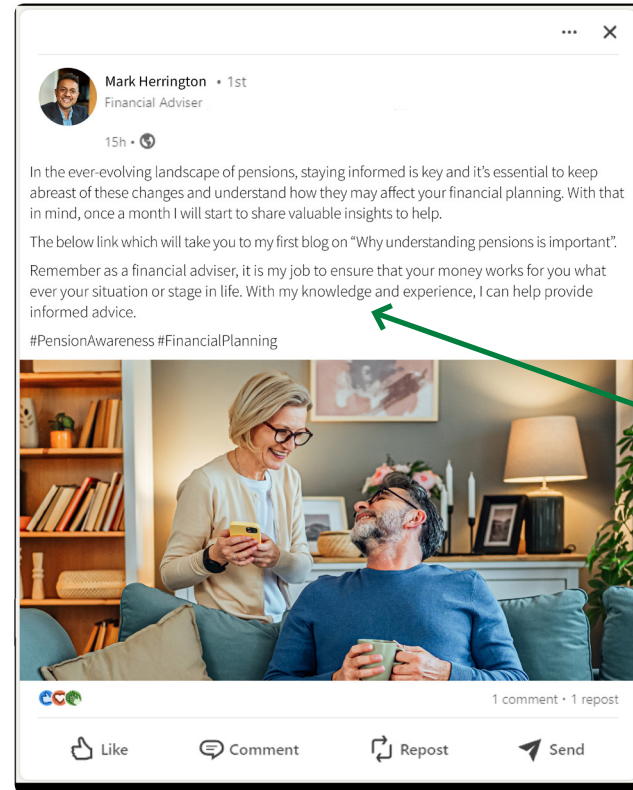
Remember a financial promotion is any client communication which is an invitation or inducement to engage in investment activity undertaken through the course of business, whether the activity is investment, pension, mortgage, protection or otherwise.

Pension post – non-financial promotion

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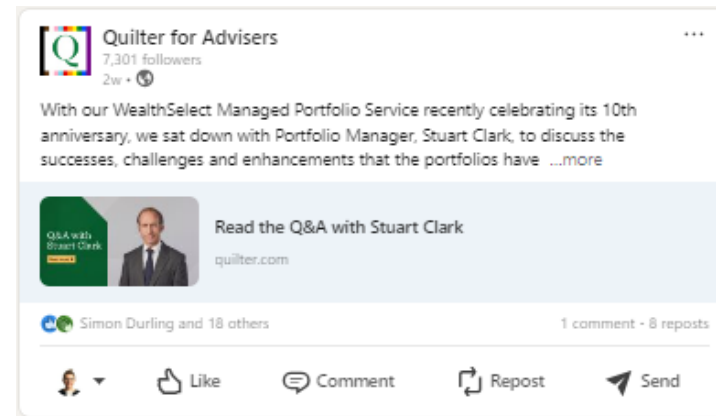
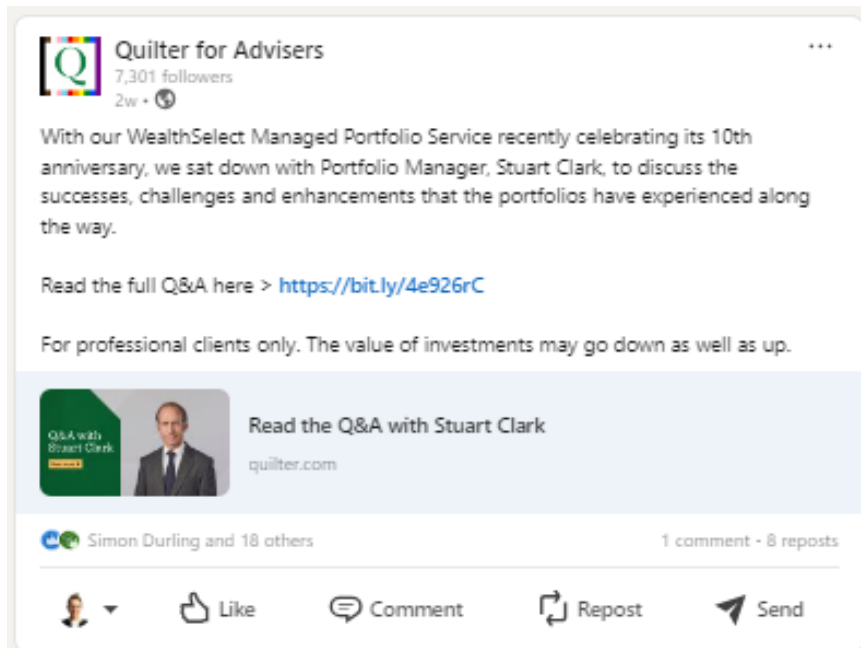
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2. An invitation – the action of inviting someone to do something.
3. Terminology/general sales pitch – exaggerated commendation for promotional purposes.

Anniversary post – truncated B2B non-financial promotion

Compliant: risk warning not required but included



This is a generic promotional material, with no invitation or inducement to engage in investment activity undertaken through the course of business, whether the activity is investment, pension, mortgage, protection or otherwise.

No trigger to include a risk warning.

Seminar post – truncated B2B non-financial promotion

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Due to popular demand we are running further webinars on the new pension landscape since the abolition of the Lifetime Allowance.

Our Head of Proposition Specialists, Roddy Munro, will cover:

- ✓ The risks and opportunities with Transitional Tax Free Amount Certificates
- ✓ How to apply for these new certificates
- ✓ Understanding the new Lump Sum Death Benefit Allowance
- ✓ And much more!

Don't miss out and secure your place now > <https://bit.ly/45mDE1R>

Secure your place for the webinar now
event.on24.com

Kiran Kaur-Costa and 9 others
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Due to popular demand we are running further webinars on the new pension landscape since the abolition of the Lifetime Allowance. ...more

Secure your place for the webinar now
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Lifestyle posts

