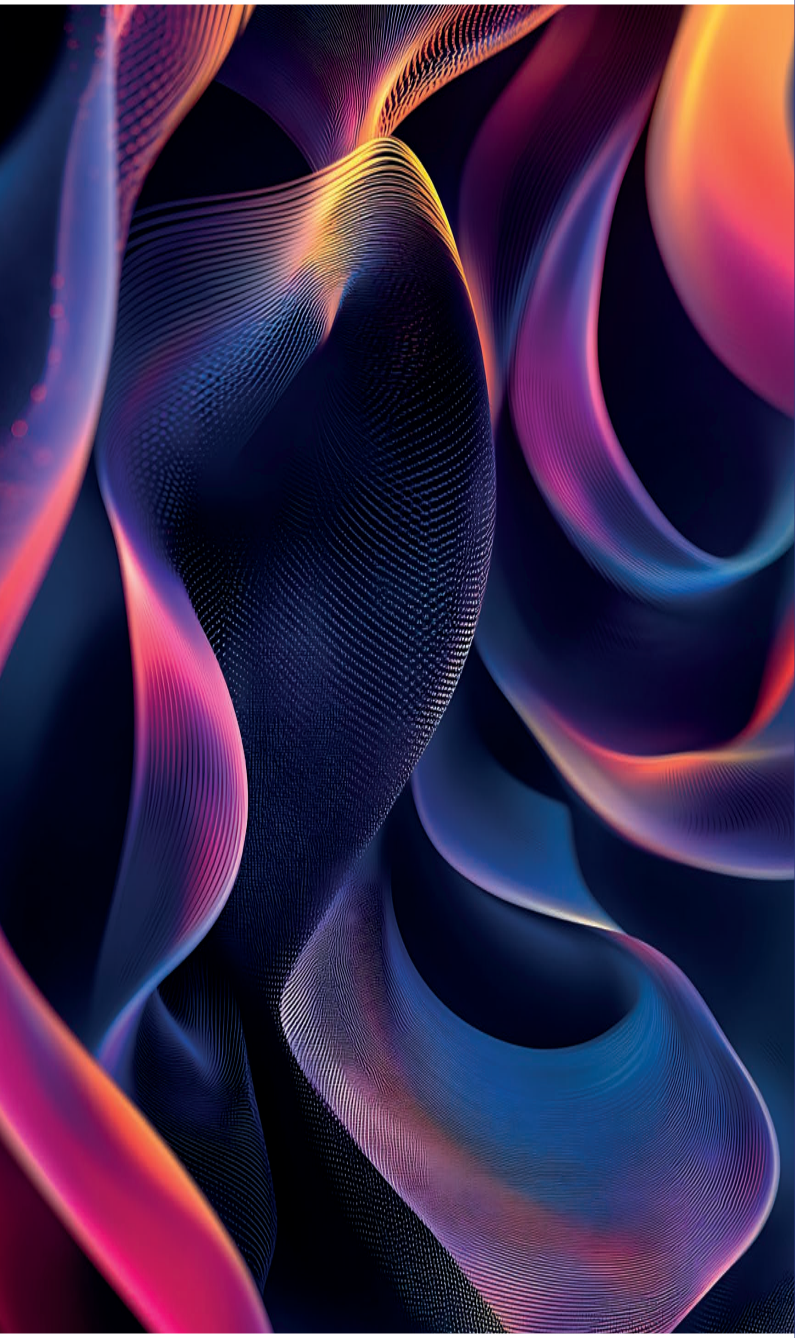
ProFundCom

raising assets with marketing automation

2025

FUND MARKETING EMAILS THAT WORK: A GUIDE TO MASTERING TEMPLATES

From look-and-feel basics to advanced engagement methods, get the skill set every fund marketer needs to design, develop and deliver outstanding email updates to ideal investors.



PROFUNDCOM
Provides marketing automation for:

salesforce

Dynamo SOFTWARE

dakota

BACKSTOP SOLUTIONS

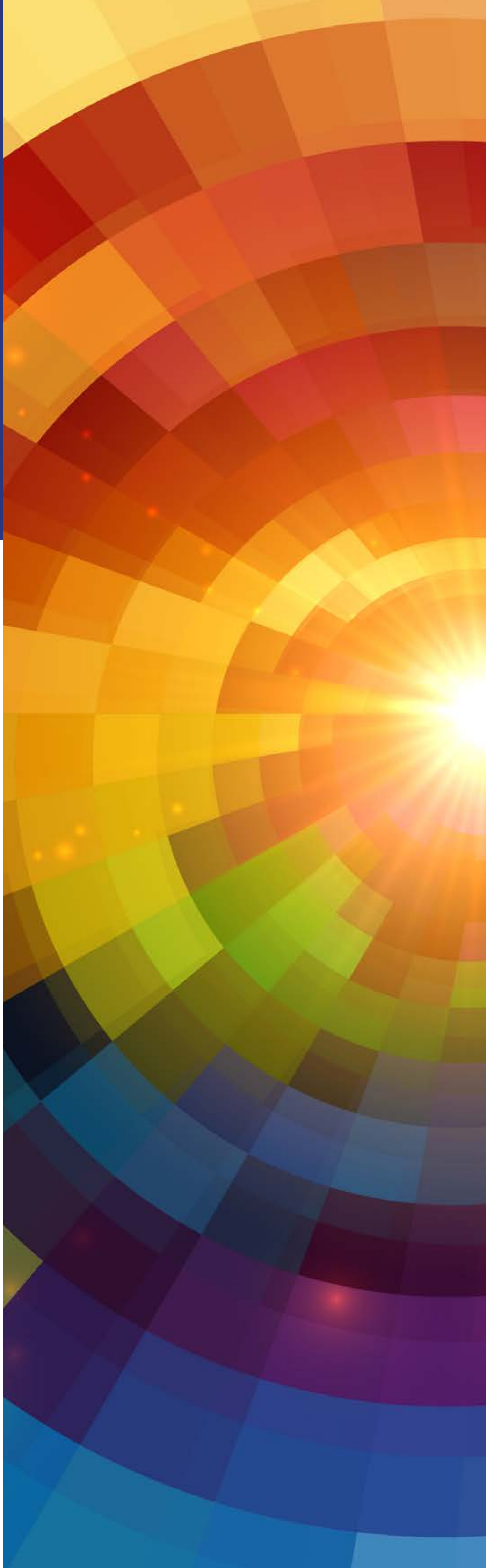
Microsoft Dynamics 365

SATUIT TECHNOLOGIES

FolioMetrics

Q2.

INTRODUCTION



Never Underestimate the Humble Email

Sifting through emails is a universal experience. Coupons and promotions, shopping cart reminders, or a wedding invite to RSVP to. Investors likewise hope to receive updates from the fund they place their money with, so making them stand out in their inbox is imperative.

This presents amazing fund marketing opportunities: emails cover a range of content formats from product releases to monthly factsheets or a plug for a new video series on ESG investing. Plastered with a logo, colour scheme or people photos, they do a lot of brand awareness hefty lifting without much effort.

That is so long as there are templates in place. They work as a blank canvas with swappable components, making sending off personalised versions to every subscribed investor much quicker, without the headache of failing compliance. When this distribution can be automated, the sky's the limit for reiterating great investor experiences.

We've been singing the praises of email marketing templates since we first started ProFundCom, and we're still going! There's rarely a greater form of financial communication than the email format – fund marketing's Venus de Milo – so crafting the best examples you can from the ground up should help reap AuM returns time and again.

We hope you find this template guide packed with information to help you do just that.

All the best,

Paul Das
CEO
ProFundCom

CONTENTS

01 THE STANDARDISATION X-FACTOR

The average person receives around 120 emails every day. On a global scale 2026 is set to see almost 400 billion daily emails landing into inboxes. It's an unfathomable amount but goes to show that, like timeless fashion, email's favourability has never gone away. No matter how much we thought it would...

This is especially true in fund marketing. Many firms rely 100% on emails for their consistent investor communications and it's still the medium of choice for that audience. Despite the proliferation of YouTube channels or self-curated social media feeds, nothing beats the simplicity of receiving hand-picked updates without making the effort to seek them out – especially those you've opted in to with your personal details.

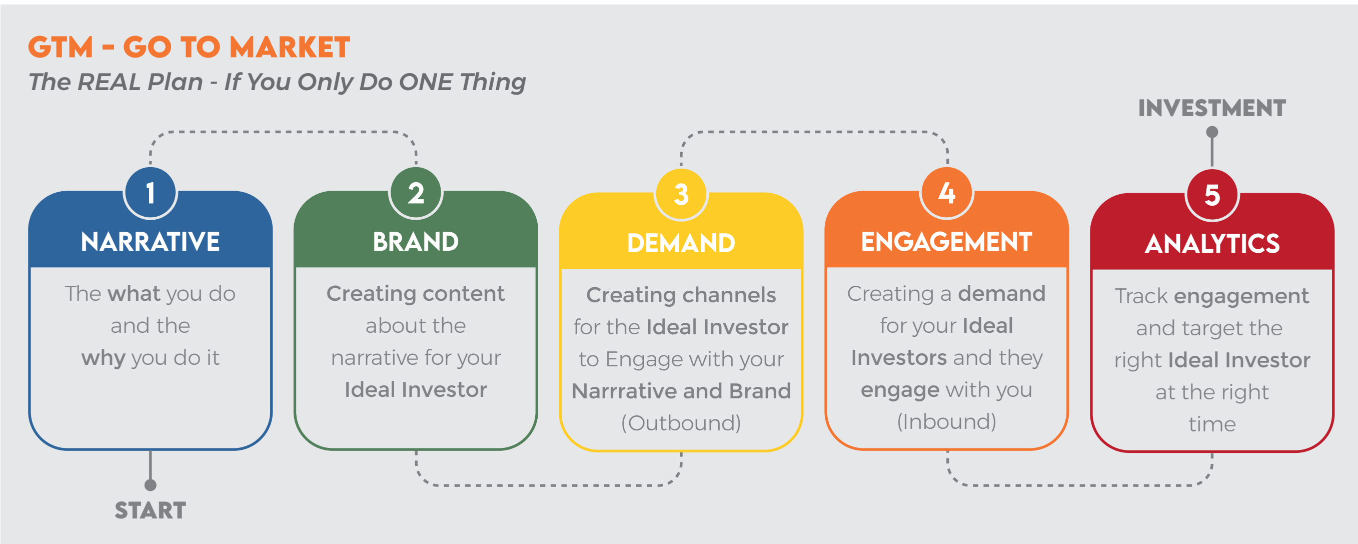
It stands to reason that funds are always looking to find ways of producing (and reproducing) huge amounts of bespoke emails that can tailor content in the most streamlined way possible. Knowing how to create brilliant reusable templates is a great start and many funds are taking the plunge as part of their go-to market (GTM) strategy.

The aim of a GTM plan is to take investors' initial interest, build their awareness of your fund, keep feeding them great content, analyse their responses, and iterate what's working. At any one time, only 5% will be ready to take the plunge and the remaining 95% are all potential buyers who need to be fed fund information or thought leadership consistently. Nobody invests from a glance at one fund page, and it usually takes up to 11 touchpoints to turn engagement to investment, which is where customisable and (most importantly) *automated* email templates come in very handy as GTM collateral.

"Design is art optimised to meet objectives." - Shimon Shmueli

Large fund houses may be able to hire a full creative team in-house. That's not the case for many small or mid-sized funds where marketers often steer the design ship. This is fine, as hiring graphic designers or agencies is a popular choice to draw up well-designed marketing assets on a budget.

Outsourced designers often work on one communication format including email templates, but also landing pages or downloadable PDF reports. Instead, Creative Directors are becoming more commonplace. They can work with (and report to) the C-suite to steer empathetic customer-centric design in conjunction with business objectives that keep return on investment (ROI) in mind, all while giving every marketing piece a visual identity in imagery and copywriting.



This same principle of consistency extends to the end products: templates that cover every format of popular fund email including factsheets, investment articles, fund updates, webinar invites, event attendance reminders and thank yous.

When every type is standardised, content becomes memorable and more credible. Let's start with unpacking the value of every small design element to create an excellent, unified whole of a template...

THE PERKS OF CONSISTENT EMAIL TEMPLATES:

- **Maintained professionalism:**
  templates enable emails to maintain their corporate identity, nurturing investor trust.
- **Brand recognition:**
  with many chances to feature branded elements in templates (logos, colour schemes, fonts), that repetition strengthens association with recipients.
- **Personalisation:**
  individual investors can receive content specific to their needs by using merge fields or dynamic content.
- **Saved time:**
  building frequent emails from scratch is a drain, where valuable time is reclaimed by only needing to update templates with relevant messaging.
- **Reduced human errors:**
  pre-designed templates lower the chances of omissions, especially critical engagement components like contact information.
- **Mobile responsiveness:**
  template designs can be set up to make them readable on multiple different devices, no matter what.
- **Split testing:**
  sending variations on standard templates through A/B testing shows marketers which versions are received best.
- **Tracked data:**
  templates built through email automation software can gauge email optimisation with AI-tracked analytics including open rates, click-through rates, bounces and more to make future improvements.
- **Scalability:**
  pre-made templates make scaling to large subscription bases simpler and faster – without compromising the impact of their design elements!

02 GO BACK TO BASICS, THEN GO FORWARD

An email's convenience in conveying large amounts of information is deceptively simple. Plenty of thought may go into a template, but getting the basics into place across the board means you can patch multiple components together to fit one great final product.

"A designer knows he has achieved perfection not when there is nothing left to add, but when there is nothing left to take away." - Antoine de Saint-Exupéry

THE ART OF USER EXPERIENCE

All designers will tell you that 'less is more'. That's music to fund marketers' ears who want quick wins for maximum engagement. Great-looking emails are a joy to look through and also pertain to accessibility or readability factors that can stymie the effects of long winded or overly fancy-looking templates. It's a misnomer that designers want to make things look pretty – they want to reduce the parts, the complexity, the wastage and the costs.

One design mantra is all about form and function. So the starting point for any email is, what is the goal, and does this email intend to achieve this? This can be:

- To convey complex financial data in a digestible way as an educational tool.
- To increase a subscription base for more engagement.
- To prompt investors to sign up to an event or download 'lead magnets'.
- To build up lead scores for higher conversions.

Fund marketers must craft something that communicates value and is also entertaining enough to interact with to achieve the AuM-building mission. It's all about knowing who each email is for and getting that message across in as little as two or three seconds.

This takes creativity across every template element. After all, you can't out-Blackrock Blackrock on the spending front. But you can apply brilliant UX design nous to retain a competitive edge in email inboxes.

THREE MAIN CONSIDERATIONS

Colour Pallets

We all respond to certain colours emotionally as each represents certain moods. One colour will interact with a different colour better than another. Colour Theory underpins how an email resonates as a feeling and can guide how you present your template in line with branded colours.

Element Positioning

In cinema, art or photography, the 'Rule of Thirds' applies, where compositions are subdivided into nine identical horizontal and vertical chunks. The same philosophy can guide a fund marketer to best display multiple template components (CTAs, images, text) in one neat, appealing section.

Information Discovery

People tend to scan emails rather than read them through these days; there's a growing popularity for 'scrollable' mailers that reveal more as the user navigates further down. It acts like an interactive brochure, key for an enlightening email experience and to boost engagement with the template's multiple elements.

1. Opening Moves

The most performant emails get right to the point all before an investor opens them to see what's inside. They need to understand exactly who it's from (the fund - the reputable source!) and how it will add value.

- **From Line:** As with many template components, consistency is key for brand recognition. Having the same address attached to the email format they're sending is one thing and keeping it personal is even better, putting a trustworthy name to a digital asset. E.g. team@fundname[dot]com.

- **Subject Line:** Some publications use as little as three words to convey the story they're about to detail. That's tricky to achieve, but so long as the subject is a hook to reel in investor interest, that's perfect. It should give them an incentive: how to solve a pinpoint, urgency to sign up for an event, or an enriching attachment they can get for free.

- **Header:** Acting as the distinctive 'eyebrow' of the email, it can be more creative in informing an investor what to expect from its enclosed content, or entertaining in posing a thought-provoking question to be answered. The tone can establish exactly who it is from, adding recognition alongside the From and Subject lines.

The underlying lesson for all three is make every word count!

2. Images & Financial Content

What has been mocked up on a designer's MacBook screen may be a 'wow!' moment, but that does not mean it will come across well when it's crunched down to an investor's laptop or phone on their lunch break.

Many images look promotional and SPAM-like and can harm deliverability (more on that later). Text-only emails can come across more like a personal one-to-one conversation and increase open rates.

However, people do not tend to read every word, despite efforts to entertain them with witty anecdotes or historical comparisons in market outlooks (like Patrick Hutber, for instance). Images grab attention and can be painted in brand colours, even inspiring readers to share them with their friends. They become part of a visual identity that can be repeated easily across all content.

Of course, data-centric graphs and performance convey striking interpretations of dense numerics like historical fund performance or performance benchmarking. Some select words can, however, give some pinpoint context and some excellent takeaways to leave investors with – an effective 'too long didn't read' (TL;DR) tool for both long paragraphs or complex tables.

Ideally, a template will achieve a careful balance of text and imagery where each serves a purpose.

TOP TIP

If the email runs on a little, an inviting summary paragraph at the template's top can encourage investors to discover more as they scroll.
E.g. See below why copywriting considerations impact email readability!

3. Copywriting & Body Text

Considering that many email recipients would rather skip ahead to what they'd like to read, the priority for template layout copy is to make paragraphs short, and present them with frequent breaks. This, in line with schools of typography, gives space to make certain text stand out and allows room for readers to digest what they've just consumed.

- **Sometimes that means using bold text and bulleted lists where appropriate.**

That does not mean quality needs to be neglected! Just as you need to make your blog or report content vibrant, this must be replicated in an email. Investors like storytelling: discovering a problem and finding solutions that lead to a desirable outcome.

This can help lay out body copy well. It doesn't have to be long winded, but it should flow naturally to get them to act on links and buttons. This 'accidentally leaked' AWS email captures the art of wordsmithing and development very well.

Another thing that readers enjoy is good news, particularly in financial markets. Focus on what led to positive outcomes and success stories, so long as it educates about addressing financial needs too, David Attenborough style. This positions your domain expertise, all matched by your tone of voice to lend authenticity to the words you write.

Stories evolve over time. Discover what's trending to make regular emails more personalised to current events. This also grants opportunities to address how changes in the investment world are aligned with your mission statement – growing ESG values, as an example.

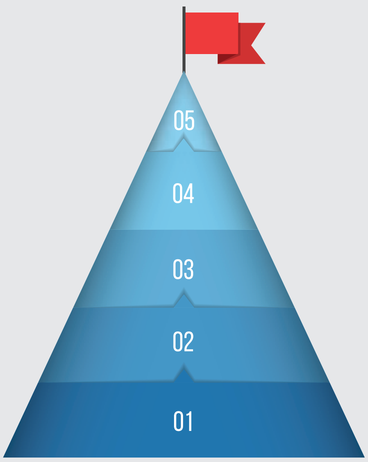
It should go without saying, but any text or image needs to be relevant and easy to understand for any recipient to boost accessibility.

CRISIS MANAGEMENT EMAILS

Sometimes financial markets take a downturn, and breaking bad news is not a situation any of us want. However, fund managers should not wait to be contacted by investors; for them to hear it from a fund first helps give clarity to the situation and positions the firm as a trustworthy, proactive source.

Personal one-to-one support via a call may be necessary, but email templates can help share contextualised news to a wider investor audience immediately. Here's our recommended structure, focused on transparency and a positive attitude – which means not leaning into negative language!

COMMUNICATING WITH CLARITY & CONFIDENCE:
A TRANSPARENT APPROACH TO INVESTOR UPDATES



1. SUBJECT LINE
Be clear in summarising what's happened in your subject line.

2. ACKNOWLEDGE SITUATION
Begin by acknowledging the situation and taking responsibility.

3. PROVIDE BACKGROUND
Explain relevant background information to give context to the investor, including its impact on the fund.

4. SHOW MITIGATION
Provide a runthrough of actions that have been taken to mitigate those effects.

5. REASSURE INVESTOR
Reassure the investor of receiving ongoing information and your commitment to finding a solution.

4.Colour Combinations

Our brains can process visual information 60,000 times more than words. The most immediate standouts will be colours which can be used in specific cases to draw attention:

Matching Colours

An HTML background in brand colours identifies who the email comes from. You can grab colours from embedded graphics using an HTML Colour Picker tool.

Grayscale vs Colour

Tabs and labels look more clickable in certain dominant colours (such as red) when contrasted with the background – a colourless email can accentuate these elements to streamline UX. Emails can also break up large white or black space using playful colours for content, featured images or gutters/separators.

ACCESSIBILITY

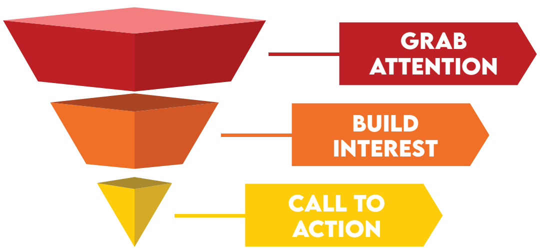
Links are usually blue, but why not dress them in your primary brand colour as a point of difference (and creative flair?) Even using colour contrast to an overall black font is great for accessibility, which can be checked with this WebAIM tool.

As a general rule, opposing or triadic (a third of the way round) colours on a colour wheel are complementary. Experimenting with colour splashes is recommended. There's no secret formula, as even left-field choices work. Yellow has performed well for both Amazon and McDonald's after all!

5. Call to Actions

An optimised CTA – which should always provide one linked path to the most important external page/document, not multiple side-by-side options:

1. Grab **attention** with an original idea or question.
2. Add more detail to build **interest** in the topic.
3. Call the reader to **act**.



Clarity is the name of the game for CTA functionality. As a fund, you want an investor to do this or that. One CTA at the top of an email can be extra effective to drive activity before they scroll further. Beyond a simple "Read Now", a creative agency might encourage someone to "Start Dreaming Bigger Today", while a fund's investor event may be subtly pushy "Low tickets – Secure A Space Now!"

Additional embedded links can direct investors to website fund pages they may not be aware of. It's good practice to dress social sharing buttons with custom icons that match the styling of the template too, encouraging end users to share them with portfolio managers perhaps.

Thinking outside the box is not a bad thing. Different copy, colours, or CTA placement can be trialled in A/B tests to see which gets the most clicks.

6. Dark Mode

Many email clients provide dark mode to reduce screen brightness and contrast, making templates look easier on the eye for desktop and mobile.

However, it's a misnomer that all Dark Modes will simply invert colours; sometimes they just reduce the lightness. To provide the option, choose template colours that won't clash when switched to Dark Mode, or those that are 'neutral' to cater to a significant number of recipients. Many automation platforms offer instant previews of templates when switched to dark mode.

EMAIL CLIENT CHEAT SHEET

Apple Mail

No colour inversions, and no large change to emails from light mode. Backgrounds appear darker.

Apple Mail (iPhone)

Inverts colours – backgrounds are dark, and text is light.

Gmail (Desktop)

Black or dark grey background and white text.

Gmail (Mobile)

Black-on-white text inverted.

Office 365 (Mac)

All colours appear darker.

Office 365 (Windows)

Saturation is reduced. A darker background colour, but with lighter shades for text.

Office 365 (Mobile)

Darker backgrounds, subdued colours, and grey icons.

Designing templates embraces having fun and trying out options that differentiate your investor communications from the pack.

Once the styles, fonts, tone of voice, colours and more are determined and documented in a brand guideline folder, this becomes a consistent language for the whole fund to believe in, where that value system spreads outwards. A brand will change over time – you can't stick with a static wardrobe forever!

If you'd like some **'aesthetic inspiration'** or copy ideas for urgent fund updates or webinar invites, check out our **Template Inspiration** section at the end of this paper.

03

THE FINER DETAILS FOR EFFECTIVE TEMPLATES

"Thinking about design is hard, but not thinking about it can be disastrous." - Ralph Caplan

You have all the styles and formatting down – so that's surely done and dusted? Wrong. Considering that an email template may reach up to thousands (if not tens of thousands) of investors, final checks must be in place. With best practices conducted when reviewing an email, it'll be far less of a time-draining headache to troubleshoot after pushing that send button!

'THE DOS'

• REPURPOSE FROM A MASTER TEMPLATE

Your final functional template works as the blueprint to cover any scenario. Replicate it for every future email where you can add, take out, or make changes to the layouts and diversify content to whatever you need for news alerts, event invites, fund updates, webinars and more.

The Master Copy can also include up-to-date terms and conditions or compliance messages, so that the regulatory work is handled (until it needs updating).

• AUTOMATE YOUR DATA INPUT

With a brand in place, automated templates also allow fund marketers to feed in the most timely and appropriate financial information as soon as it is published from Dakota, Preqin, Broadridge or other data providers. It saves a lot of time and hassle sourcing timely content by hand.

• PERSONALISE THE EXPERIENCE

To strike a balance between promoting your brand and displaying the best content to segmented audiences, gauge your reader demographics. Some will love reading the FT, others are interested in trade magazines. Investors will want your updates depending on investment goals, risk tolerance, or have an appetite for exclusive research into, say, European Equities, as opposed to on-the-fly worldwide market analysis videos.

Artificial intelligence (AI) is not just a hot topic when it comes to segmentation. It can automatically collate all your marketing platform data with a CRM, then compartmentalise investor preferences to visualise everything you need to know about them.

While mail merge in the past has worked wonders for inserting investor data into templates, linked to databases, AI automation is going further to trigger dynamic content per user. This means that any template content gets automatically adapted according to a recipient's touchpoints in the CRM, boosting personalisation to deeper levels and ensuring their tastes are rewarded beyond a simple salutation.

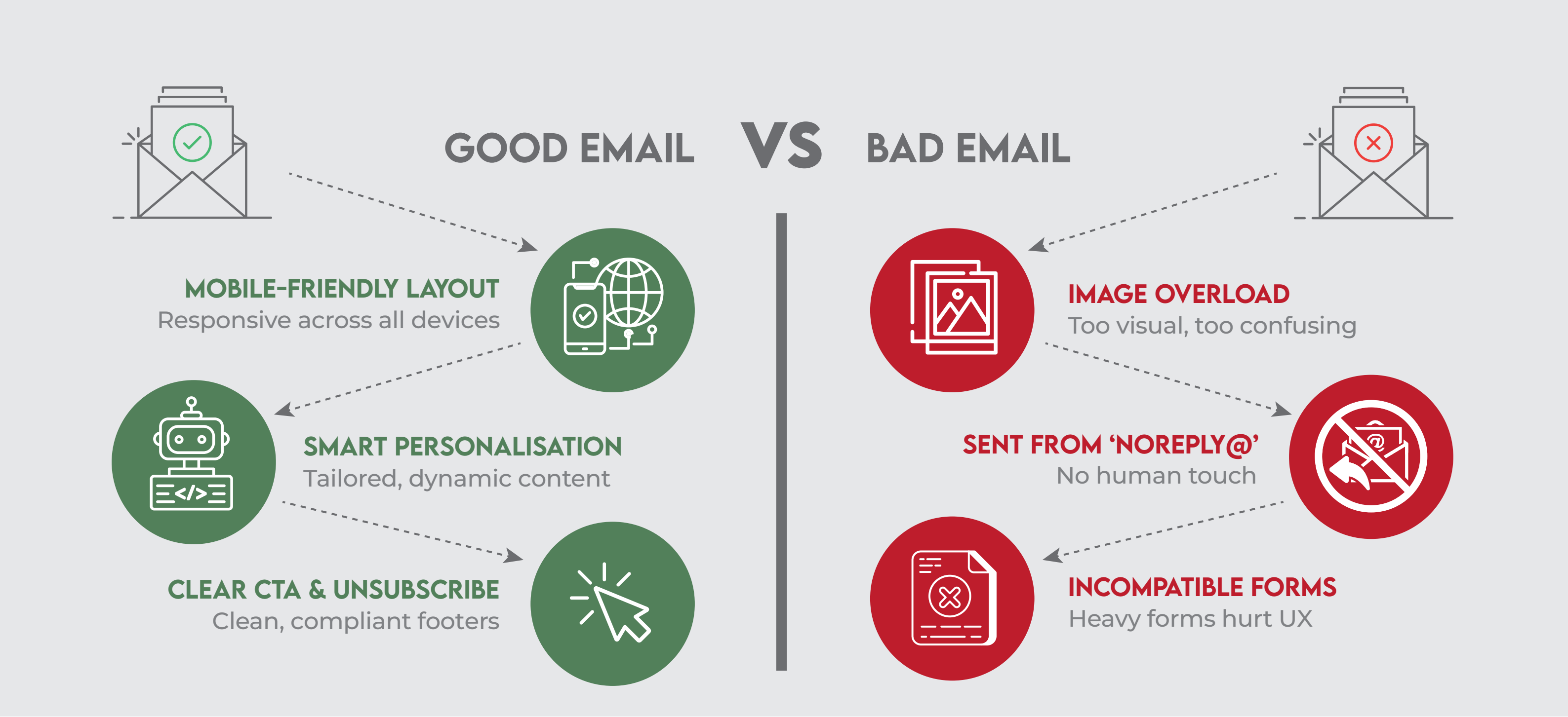
• ADD UNSUBSCRIBES

Consider only the essential investor information you'll need to gather to create a simple sign-up path to reach their desired action, e.g. 'hear more' to register their email for a future event series.

Offer links to helpful contact information such as an email address, phone number, or social channel where investors can reach out with questions or queries. Giving the option to opt out from email updates is a legal requirement in most regions, and this must be easy to navigate to for maximum UX. It's commonly found in footers.

• TEST FOR RESPONSIVENESS

Many investors will check their emails on the move, so every component has to render flawlessly across all devices. Tools are available to identify how mobile and tablet-friendly a design is, and such testing services



can identify if the template is following best practice for readability and compliance.

In more advanced cases, media queries allow developers to customise content to be responsive to different mediums: max-width is a commonly used query where, with any width being less than the given value, all the CSS within the query will work.

iPhones and iPads have some easy starting 'breakpoints' as opposed to Android products developed by various manufacturers, but here are options that cover many devices:

- Breakpoint 1 (iPhone 5S): **320px**
- Breakpoint 2 (iPhone 6+): **414px**
- Breakpoint 3 (iPad Mini): **703px**

• BREAKPOINT 4 (IPAD AIR): 768PX

Different device targets can be found over at: *howtotarget.email*

• GET INTEGRATED

Email automation is just one cog of the fund marketing data engine where, when synced with a CRM alongside a website, social media channels, webinar platform or investor portal, resulting email engagements can be brought into a unified fold of usable investor data.

Some systems enable mass mailing as an integration in their investor relations suite (such as Dakota). Here, email template campaigns work with the same investor insights to also play a huge part in future omnichannel marketing strategies.

'THE DONTS'

• THE DREADED 'NOREPLY'

An ultimate bugbear is delivering a template from an anonymous noreply email address. They're less trustworthy and discourage engagement, suggestions for improvement, and conversions.

• MORE THAN ONE SENDER

Only one address in the Header should be given, including a valid Message-ID header field in each message.

• TOO MANY IMAGES

These produce an imbalance template, while embedded images need to be delivered through safe platforms to not trigger Spam alerts.

• CCS OR BCCS

An overload can look suspect to email client filters.

• FORMS

Not only are hefty forms distracting, intrusive, and look clumsy on mobile for incompatibility on certain devices, they are prone to security warnings that could compromise sensitive data.

• COPY-AND-PASTE

Taking text from one application to a template editor can also copy extraneous styling code that ruins the formatting. Use a blank text editor mediator such as Notepad if necessary.

• OVER DESIGNED TEMPLATES

These look applicable only for Outlook, as opposed to bespoke messages covering many email clients. Slight differentiations will make emails look authentic, even from a bulk automation tool.

04 TROUBLESHOOTING TEMPLATES IN 'POST-FLIGHT' CHECKS

Every aspect of fund marketing is iterative. Housing reusable Master Templates for each email type is brilliant for standardisation, to look great and be functional, but the proof is in the pudding. Success comes by degrees. Even the most exemplary email templates must be road-tested to determine their true ROI potential.

"That which is measured improves." - Karl Pearson

ARE YOUR INVESTORS PAYING ATTENTION?

To paraphrase a wise character from a children's film: the past can hurt, and you can either run from it or learn from it. It's far from silly, as it applies to successful fund marketing – improving data is all about checking the data and seeing what's gone wrong (or hopefully right!)

This goes back to what you laid out as your intentions for your email template in the first place: to gain new subscribers, or to reach a newly engaged demographic. This dictates what metrics you'd like to track to paint a picture which, gathered by email automation software and underlying AI, can be visualised easily.

AI can identify popular themes and tally lead scores per digital engagement, and it is also able to help forecast where (and to who) marketers should focus retargeting efforts. To do this, machine learning algorithms segment audiences according to similar grouped dynamics, as follows:

Funds can then continue to promote retargeted templates that are focused on the benefits of investing, in line with the language and content applicable to their identified backgrounds and predictable likes and dislikes. This can nurture interest, or also reignite it, as those that did not complete a subscription for a report may need an extra nudge to help them take any extra leap toward a conversion.

Through better engagement, growing distribution lists are easy to quantify as marketing attribution for quarterly ROI meetings. If they stall, this can indicate that emails are not prompting actions enough, or if investors are getting email fatigue. You can then pinpoint where content or CTAs need to be refreshed or refined to rectify this.

EXPERIMENTATION

Template success is a lot about trial and error, including delivery times; when's best for the widest possible audience to read them? It's always up for debate, but these general rules (for GMT) can all work:

6am: *go-getters check their email first thing before waking up fully.*

10am-11am: *generally considered the best hour to send.*

2pm: *post-lunch distractions can be capitalised on, as well as US breakfast time and the end of the day in Asia.*

8pm-12pm: *times when investors check their messages before bed.*

AI-DRIVEN AUDIENCE SEGMENTATION

LOW HANGING FRUIT

actively engaged prospects.

CROSS-SELLING OPPORTUNITIES

existing investors looking into new fund options.

REDEMPTION RISKS

existing investors who have stopped looking at your marketing, who may be ready for redemptions.

MARKETING ALPHA

long-dormant prospects who are re-engaging.

Email automation software also allows users to run A/B testing – where elements such as subject lines or CTAs can be changed in two different emails to see how they perform comparatively, according to these common metrics:

- **Open rates:** percentages of email opens (which, on average, is at least 20%).
- **Click-through rates:** content engagements from the email.
- **Conversions:** the percentage of successful conversions compared to the total number of emails sent.
- **Subscription growth:** the time to increase followers for your regular communications.
- **Unsubscribes:** those that drop off of your subscription base.
- **Bounce rate:** incomplete deliveries.

A/B testing allows you to pinpoint which changes contribute to raised email metrics, as you always have a baseline control variable. A/B tests should ideally target different groups to hone in on hyper-personalisation successes per investor base.

Marketers are not statisticians, but digital marketing platforms make data analysis much simpler to fine-tune most investor-centric templates and work out a sweet spot for email content and frequency.

DETERMINING DELIVERABILITY

Email delivery is all about your intended recipient's email client accepting your email. This differs from deliverability: the percentage of your emails that end up in inboxes rather than junk.

EMAIL JARGON EXPLAINED

▶ ***Email Service Providers (ESP)***

A company that allows platforms to send transactional or commercial email campaigns.

▶ ***Internet Service Providers (ISP)***

Services permitting users to access internet capabilities through cable, wireless or fibre optics. Inbox Providers can grant mailboxes to their users, with paid or free email accounts or apps (such as Gmail or Yahoo).

▶ ***Internet Protocol (IP)***

A bespoke tag for devices connected to the internet – like a global home address for computers outlining you and your server.

▶ ***Domains***

Names identify the network locations of servers or devices. Domain text is used to locate a company online. A Domain Name System (DNS) transforms a domain name into an IP address.

▶ ***Subdomains***

How to separate various marketing streams from the same company. E.g., marketing.[companyname].com shows the sender represents the marketing arm for a fund.

FACTORS AFFECTING AUTHENTICATION

Some common Spam triggers such as strange punctuation in Subject Lines may not be viewed kindly by email clients, nor can mixing HTTP (unsecured web assets) with HTTPS (encrypted web assets), using misleading or urgent language, or having a density of images – so all of these are best avoided. HTML messages, if sent, must comply with the Internet Format Standard (RFC 5322) and not hide content.

Beyond the template content itself, bulk sending from single IPs can also trigger SPAM filters. With funds sending multiple templates out over time, sending patterns and volumes, complaints and 'marked as Spam' emails can all influence IP Reputation scores – engagements between users and sender IP addresses, tracked by ISPs. Spam traps may be used by inbox providers to catch scammers, but can tie up legitimate senders that have poor data hygiene, too.

Getting your emails authenticated stops phishers or scammers spoofing your account, so it's more than imperative to authorise your emails in line with the following existing methods:

1) A **Sender Policy Framework (SPF)** is configurable by a domain provider as a list of authorised IP addresses for a server to match for eligibility.

2) **DomainKeys Identified Mail (DKIM)** verifies a sender using a digital signature. It shows an organisation taking responsibility for making their emails transferable to email standards.

Built on top of these protections is another effective authentication tool: Domain-based Message Authentication, Reporting, and Conformance (DMARC). It allows a domain owner to control which authentication methods they use for emailing, what actions to take if SPF or DKIM checks fail, and how reporting data must be shared to monitor potential abuse. You can gradually adjust policy configurations from a "none" policy to automatically "quarantine" or "reject" for ease.

Typical DMARC failure is attributed to incomplete SPF or DKIM records, or if a "From" header is mismatched with those used for other authentication methods. To reduce this likelihood, fund marketers should verify their DNS records are set up for correct SPF and DKIM configurations, and check DMARC reports to identify common issues.

Not only will adhering to these frameworks ensure better deliverability but act as valuable protections to save your domain from fraudsters!

BOUNCE MANAGEMENT

A good IP Reputation score is paramount, involving the authentications outlined above, and keeping an eye on soft bounces (temporary delivery failures) which can be rectified. In some instances, a recipient has a full inbox or their server is down. From the sender's side, identical content, non-embedded images and too many recipients in bulk emails can be the cause.

Error messages can highlight why emails get rejected. When emails get frequently bounced or sent to non-subscribers, that lack of quality assurance can land email into Spam folders or, worse, blacklists; a point of very tricky return.

BEST PRACTICE

Maintaining good IP Reputation will remove you from connotations of Spam or malicious intent and makes it more likely an ISP will deliver emails to your network recipient. You can check your domain using services such as Sender Scorer. Spam reports, where ESPs can check users for old Spam filters that score past emails and campaigns, should also be investigated.

It is highly recommended to monitor sending rates, drops in response rates and recipient actions (replies, opens etc.), scan blacklists for your domain name or IP address, and see if your exchange server allows bulk communications. To check your domain status, or any linked to it, enter it on the Google Safe Browsing page – where you should be listed as being unsafe!

By sending out templates slowly at first, then building up momentum, this helps run multiple campaigns and stop any deliverability issues before they proliferate. This practice in upping consistent mailing delivery (per IP address) is known as IP warmup. Common techniques to do so involve targeting highly engaged users first before adding more lists, or staggering hourly email limits. It can take a few weeks or longer, but warming up IPs and monitoring engagement can make all the difference for deliverability.

TESTING FOR COMPLIANCE

Financial services, by nature, are consistently under a fierce regulatory spotlight. To protect investors and funds alike, rules around data privacy compliance have been introduced through General Data Protection Regulation (GDPR) in the EU, and Markets in Financial Instruments Directive (MiFID II), focused on transparency.

This means email template deliverability can be affected month to month. Depending on the focus of the email template, funds have to take into account notes on performance, risk warnings, confidentiality notices and disclaimers beyond unsubscribe buttons. Building trust involves being transparent about investment strategies, addressing potential risks, and displaying clear contact information.

There is no one-size-fits-all solution to how compliant requirements read and they differ jurisdictionally. Industry disclaimers may require legal advice. Once relevant notices are determined and compartmentalised as an email component – perhaps within the email footer – they can be easily replicated automatically from a template.

Email testing services are also available to scan emails to see whether their content is in line with compliance heuristics, which goes hand in hand with seeing watchlist reports and Spam checks.

UNDERSTANDING DATA PRIVACY

Consumer data is vital to protect and to increase the integrity of a financial institution, with regional privacy laws in place to keep financial services in line:

- **General Data Protection Regulation (GDPR):** Standardised EU-based regulations granting control to its residents over how their personal data is used.
- **Gramm-Leach-Bliley Act (GLBA):** A Federal US law to secure confidential financial consumer data.
- **California Consumer Privacy Act (CCPA):** Grants consumers the right to manage how an organisation collects sensitive data.

Similar specific region laws include China's Cybersecurity Law, or Brazil's General Data Protection Law (LGPD). Adequate data protections from nations outside of these countries often permits cross-border data sharing, so maintaining safeguards for financial communications data is a must, especially for emailing recipients in different jurisdictions.

CROSS-BORDER DATA COMPLIANCE BEST PRACTICES

- Gain consent from every user to store their given information.
- Delete personal data if requested, and erase unused data.
- Be open about how their data is used through disclaimers.
- Enable email encryption to spot cybercriminals obtaining sensitive information.
- Teach employees around email safety: how to spot phishing, multi-factor authentication and strong passwords.
- Scan emails with testing software against compliance requirements.
- Notify recipients regarding any data breaches.

GO FURTHER!

When a template's reputation is cross-examined by the moving parts of a connected email network, it stands a better chance of consistently delivering great insights to intended recipients. From there, the template's nuts-and-bolts are taken care of and fund marketers can spend more valuable time on refreshing content to increase subscribers through incentives, events, and consistently on-the-ball industry trends.

CONCLUSION /

MAKE EMAIL TEMPLATES YOUR GTM SUPERPOWER

A functional email looks nice to read. A brilliant one grabs attention, showcases a brand and keeps readers hooked enough to take action. An even better one comprises all of that, but is also compliant under stringent financial regulatory rules!

With every design and functionality base covered, it's simple to iterate the very best of your marketing campaigns in future, and beyond. We hope this comprehensive document for developing fantastic fund marketing email templates helps you foster brand recognition and brilliant user experiences through content to drive existing and new investors towards conversions and increased AuM.

HOW DOES PROFUNDCOM HELP

ProFundCom is tailored specifically for the financial sector, which means its email templates and features are designed to address the unique needs of investment managers, wealth managers, and financial institutions. Here's how ProFundCom delivers great email templates for finance:

1. Financial-Specific Template Library:

- ProFundCom offers a range of pre-designed templates that cater specifically to the finance sector. These templates are structured to present market insights, investment reports, newsletters, fund performance, and compliance information effectively.
- The designs focus on professionalism, clarity, and data presentation, which resonate well with high-net-worth individuals (HNWIs) and institutional investors.

2. Customisability with Branding:

- Templates can be customised to align with your brand guidelines, including logos, color schemes, and typography.
- You can also create completely bespoke templates while retaining consistent branding across your communications.

3. Dynamic Content for Personalisation:

- ProFundCom supports dynamic content that changes based on recipient data, enabling you to send personalised fund updates, investment recommendations, or performance summaries to different investor segments.
- This is crucial for delivering targeted content based on the recipient's interests, investment history, or geographic location.

4. Compliance-Ready Templates:

- Since the financial sector is heavily regulated, ProFundCom's templates include built-in compliance features, such as automated disclaimers and footers to ensure that your communications meet legal standards.
- You can set up approval workflows to ensure that compliance teams review templates before sending.

5. Performance-Oriented Design:

- Templates are designed to optimize deliverability and engagement. This includes mobile responsiveness and accessibility considerations, making it easy for investors to view content on any device.
- Built-in A/B and delivery testing options allow you to experiment with different designs and messaging to see what resonates best.

6. Integrated Analytics & Reporting:

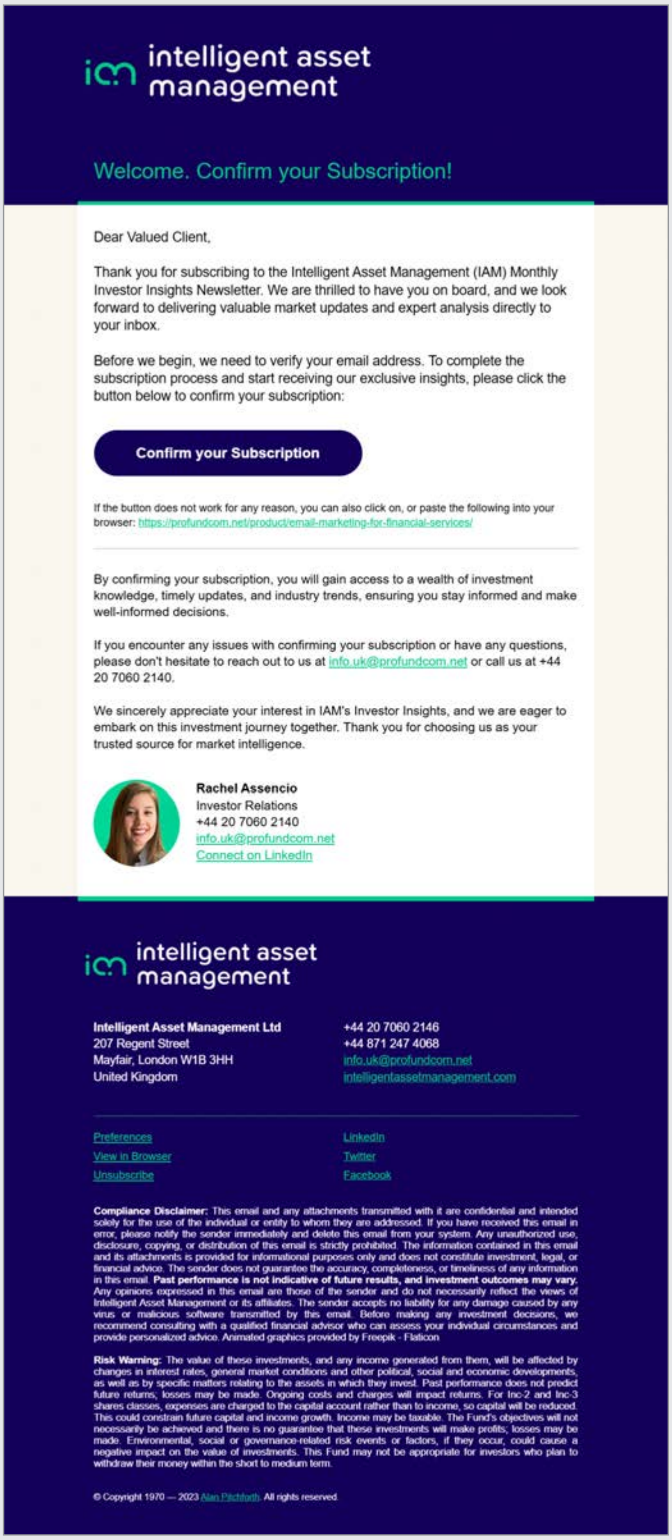
- The templates are integrated with analytics features that track engagement metrics such as open rates, click-through rates, and reader behavior.
- You can see how specific design elements, like CTAs or fund performance highlights, are performing.

7. Seamless Integration with CRMs:

- If you're using a CRM, ProFundCom's integration allows you to use your CRM data effectively when building personalized templates.
- You can pull in investor details, portfolio performance, and more directly from your CRM into your email content.

PROFUNDCOM /

TEMPLATE INSPIRATION



intelligent asset management

Welcome. Confirm your Subscription!

Dear Valued Client,

Thank you for subscribing to the Intelligent Asset Management (IAM) Monthly Investor Insights Newsletter. We are thrilled to have you on board, and we look forward to delivering valuable market updates and expert analysis directly to your inbox.

Before we begin, we need to verify your email address. To complete the subscription process and start receiving our exclusive insights, please click the button below to confirm your subscription:

Confirm your Subscription

If the button does not work for any reason, you can also click on, or paste the following into your browser: https://profundcom.net/product/email-marketing-for-financial-services/

By confirming your subscription, you will gain access to a wealth of investment knowledge, timely updates, and industry trends, ensuring you stay informed and make well-informed decisions.

If you encounter any issues with confirming your subscription or have any questions, please don't hesitate to reach out to us at info.uk@profundcom.net or call us at +44 20 7060 2140.

We sincerely appreciate your interest in IAM's Investor Insights, and we are eager to embark on this investment journey together. Thank you for choosing us as your trusted source for market intelligence.

Rachel Assencio
Investor Relations
+44 20 7060 2140
info.uk@profundcom.net
Connect on LinkedIn

intelligent asset management

Intelligent Asset Management Ltd
207 Regent Street
Mayfair, London W1B 3HH
United Kingdom

+44 20 7060 2146
+44 871 247 4068
info.uk@profundcom.net
intelligentassetmanagement.com

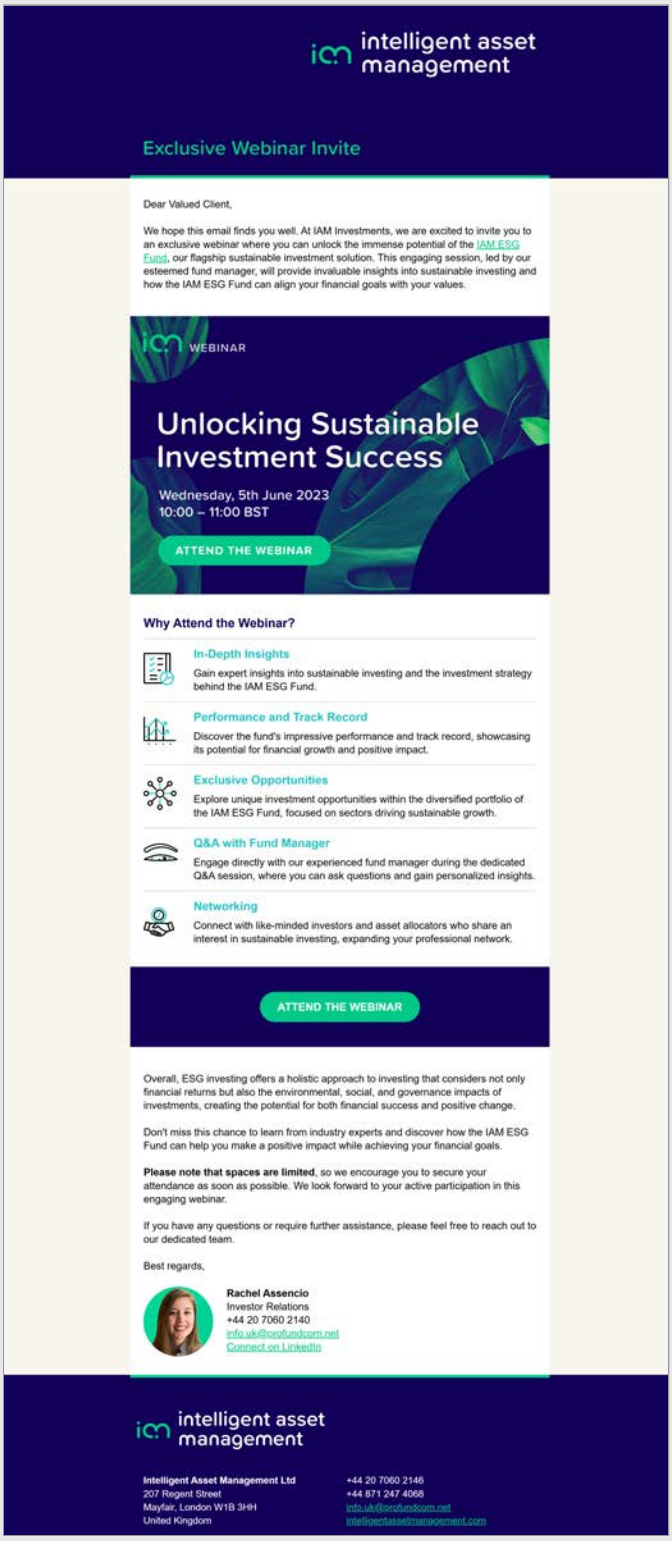
Preferences
View in Browser
Unsubscribe

LinkedIn
Twitter
Facebook

Compliance Disclaimer: This email and any attachments transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you have received this email in error, please notify the sender immediately and delete this email from your system. Any unauthorized use, disclosure, copying, or distribution of this email is strictly prohibited. The information contained in this email and its attachments is provided for informational purposes only and does not constitute investment, legal, or financial advice. The sender does not guarantee the accuracy, completeness, or timeliness of any information in this email. **Past performance is not indicative of future results, and investment outcomes may vary.** Any opinions expressed in this email are those of the sender and do not necessarily reflect the views of Intelligent Asset Management or its affiliates. The sender accepts no liability for any damage caused by any virus or malicious software transmitted by this email. Before making any investment decisions, we recommend consulting with a qualified financial advisor who can assess your individual circumstances and provide personalized advice. Animated graphics provided by Freepik - Flaticon

Risk Warning: The value of these investments, and any income generated from them, will be affected by changes in interest rates, general market conditions and other political, social and economic developments, as well as by specific matters relating to the assets in which they invest. Past performance does not predict future returns; losses may be made. Ongoing costs and charges will impact returns. For Inc-2 and Inc-3 shares classes, expenses are charged to the capital account rather than to income, so capital will be reduced. This could constrain future capital and income growth. Income may be taxable. The Fund's objectives will not necessarily be achieved and there is no guarantee that these investments will make profits; losses may be made. Environmental, social or governance-related risk events or factors, if they occur, could cause a negative impact on the value of investments. This Fund may not be appropriate for investors who plan to withdraw their money within the short to medium term.

© Copyright 1970 — 2023 Alan Pitchforth. All rights reserved.



intelligent asset management

Exclusive Webinar Invite

Dear Valued Client,

We hope this email finds you well. At IAM Investments, we are excited to invite you to an exclusive webinar where you can unlock the immense potential of the IAM ESG Fund, our flagship sustainable investment solution. This engaging session, led by our esteemed fund manager, will provide invaluable insights into sustainable investing and how the IAM ESG Fund can align your financial goals with your values.

WEBINAR

Unlocking Sustainable Investment Success

Wednesday, 5th June 2023
10:00 – 11:00 BST

ATTEND THE WEBINAR

Why Attend the Webinar?

In-Depth Insights
Gain expert insights into sustainable investing and the investment strategy behind the IAM ESG Fund.

Performance and Track Record
Discover the fund's impressive performance and track record, showcasing its potential for financial growth and positive impact.

Exclusive Opportunities
Explore unique investment opportunities within the diversified portfolio of the IAM ESG Fund, focused on sectors driving sustainable growth.

Q&A with Fund Manager
Engage directly with our experienced fund manager during the dedicated Q&A session, where you can ask questions and gain personalized insights.

Networking
Connect with like-minded investors and asset allocators who share an interest in sustainable investing, expanding your professional network.

ATTEND THE WEBINAR

Overall, ESG investing offers a holistic approach to investing that considers not only financial returns but also the environmental, social, and governance impacts of investments, creating the potential for both financial success and positive change.

Don't miss this chance to learn from industry experts and discover how the IAM ESG Fund can help you make a positive impact while achieving your financial goals.

Please note that spaces are limited, so we encourage you to secure your attendance as soon as possible. We look forward to your active participation in this engaging webinar.

If you have any questions or require further assistance, please feel free to reach out to our dedicated team.

Best regards,

Rachel Assencio
Investor Relations
+44 20 7060 2140
info.uk@profundcom.net
Connect on LinkedIn

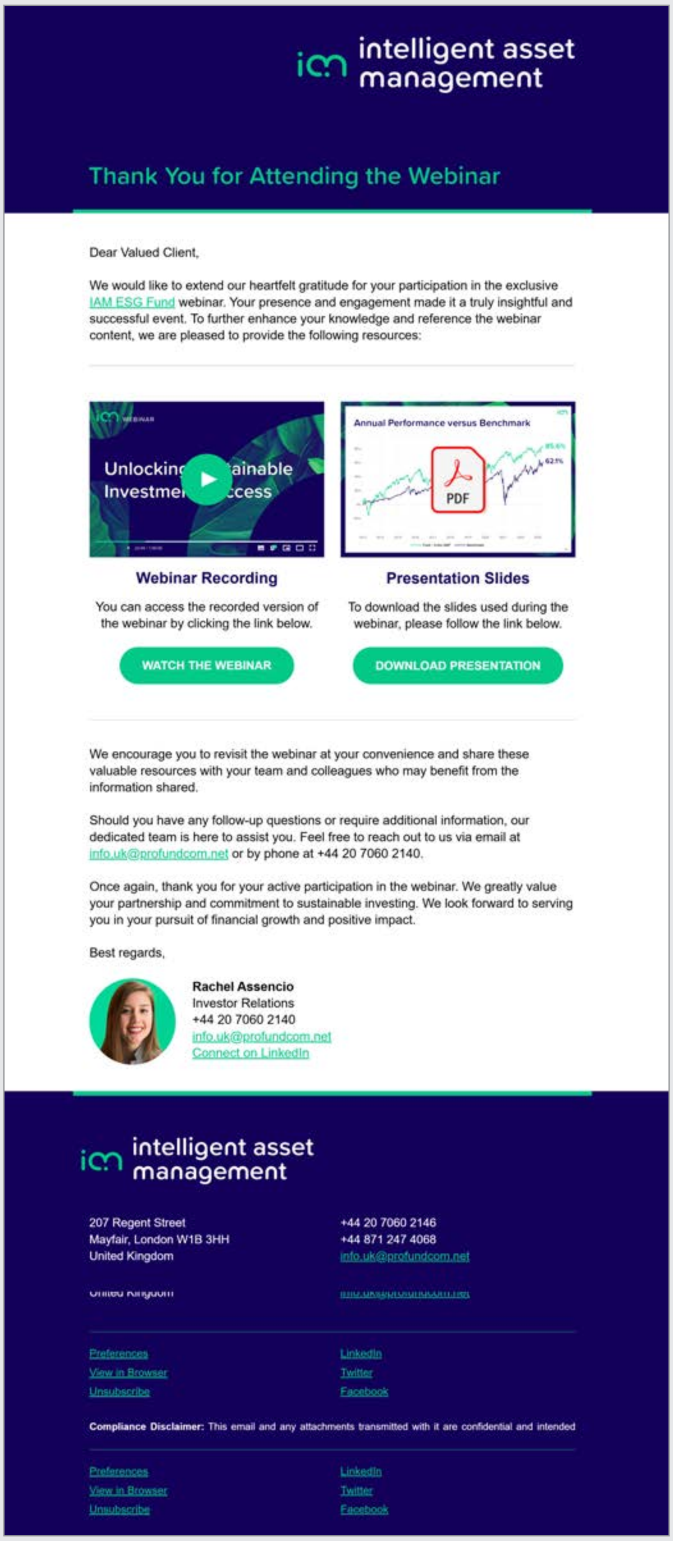
intelligent asset management

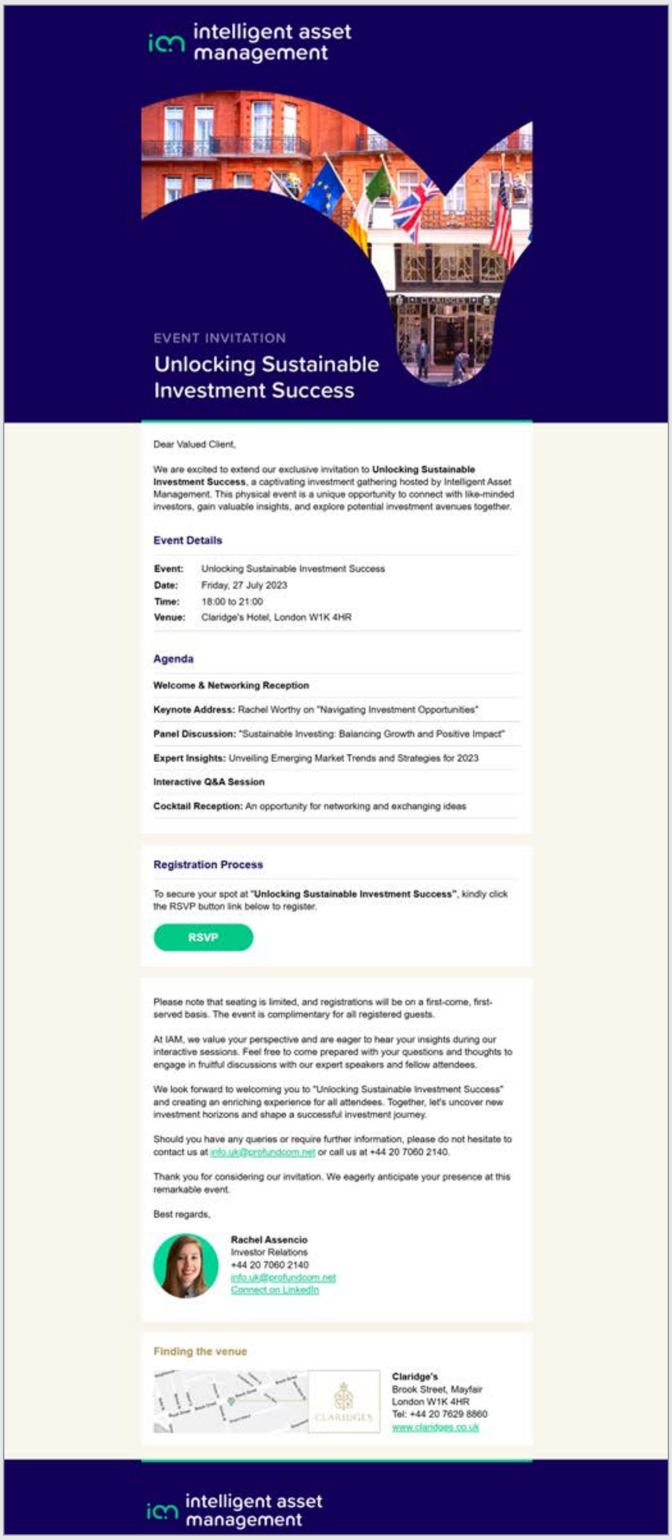
Intelligent Asset Management Ltd
207 Regent Street
Mayfair, London W1B 3HH
United Kingdom

+44 20 7060 2146
+44 871 247 4068
info.uk@profundcom.net
intelligentassetmanagement.com

PROFUNDCOM /

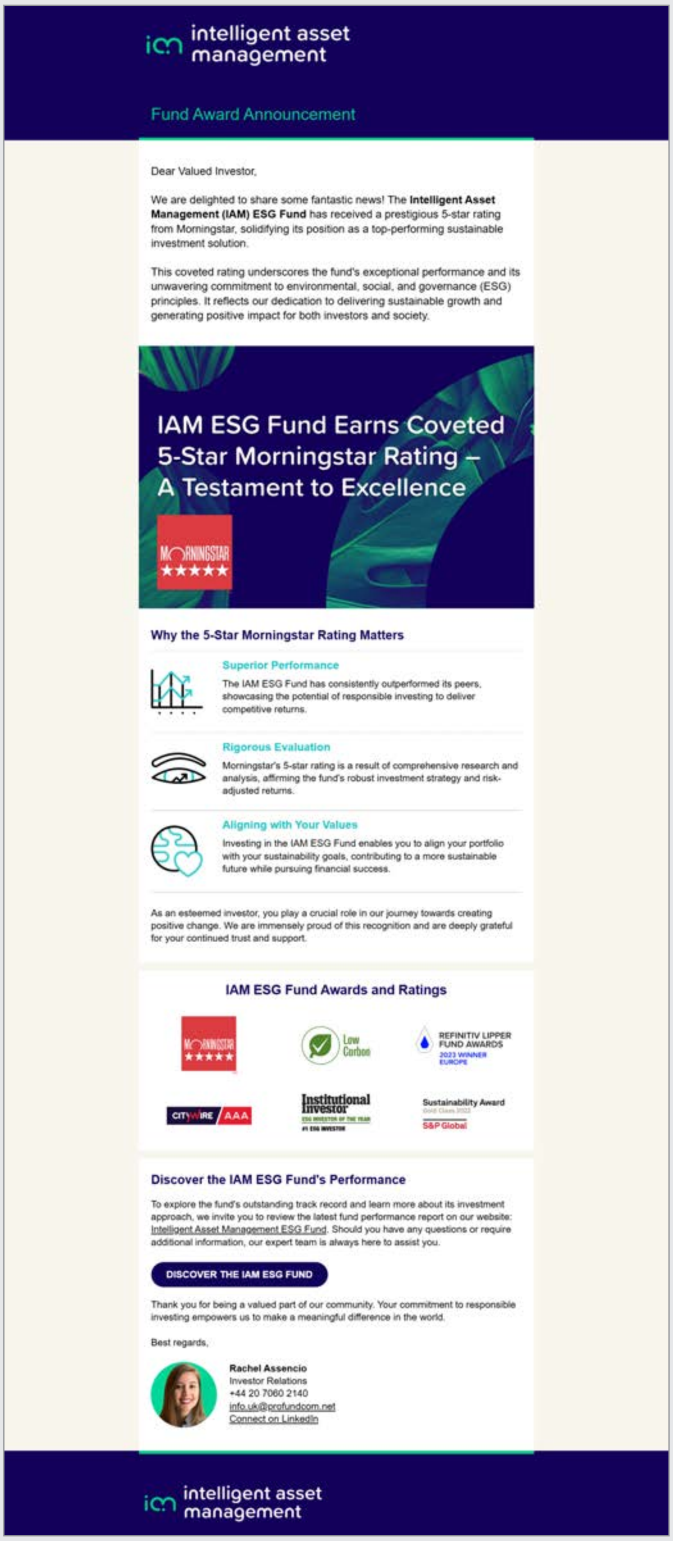
TEMPLATE INSPIRATION





PROFUNDCOM /

TEMPLATE INSPIRATION



intelligent asset management

Fund Award Announcement

Dear Valued Investor,

We are delighted to share some fantastic news! The **Intelligent Asset Management (IAM) ESG Fund** has received a prestigious 5-star rating from Morningstar, solidifying its position as a top-performing sustainable investment solution.

This coveted rating underscores the fund's exceptional performance and its unwavering commitment to environmental, social, and governance (ESG) principles. It reflects our dedication to delivering sustainable growth and generating positive impact for both investors and society.

IAM ESG Fund Earns Coveted 5-Star Morningstar Rating – A Testament to Excellence

MORNINGSTAR ★★★★★

Why the 5-Star Morningstar Rating Matters

Superior Performance

The IAM ESG Fund has consistently outperformed its peers, showcasing the potential of responsible investing to deliver competitive returns.

Rigorous Evaluation

Morningstar's 5-star rating is a result of comprehensive research and analysis, affirming the fund's robust investment strategy and risk-adjusted returns.

Aligning with Your Values

Investing in the IAM ESG Fund enables you to align your portfolio with your sustainability goals, contributing to a more sustainable future while pursuing financial success.

As an esteemed investor, you play a crucial role in our journey towards creating positive change. We are immensely proud of this recognition and are deeply grateful for your continued trust and support.

IAM ESG Fund Awards and Ratings

MORNINGSTAR ★★★★★

Low Carbon

REFINITIV LIPPER FUND AWARDS 2023 WINNER EUROPE

CITYWIRE AAA

Institutional Investor ESG INVESTOR OF THE YEAR #1 ESG INVESTOR

Sustainability Award S&P Global

Discover the IAM ESG Fund's Performance

To explore the fund's outstanding track record and learn more about its investment approach, we invite you to review the latest fund performance report on our website: Intelligent Asset Management ESG Fund. Should you have any questions or require additional information, our expert team is always here to assist you.

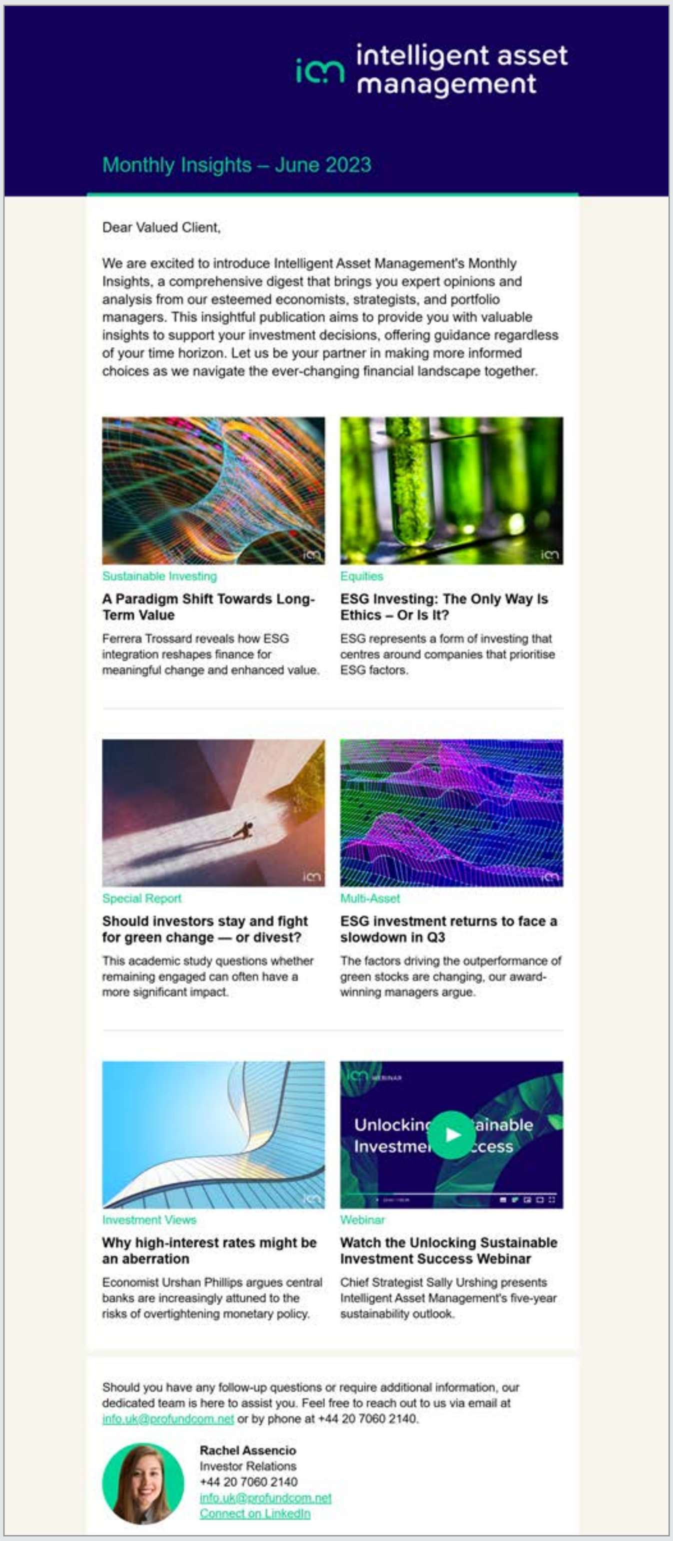
DISCOVER THE IAM ESG FUND

Thank you for being a valued part of our community. Your commitment to responsible investing empowers us to make a meaningful difference in the world.

Best regards,

Rachel Assencio
Investor Relations
+44 20 7060 2140
info.uk@profundcom.net
Connect on LinkedIn

intelligent asset management



intelligent asset management

Monthly Insights – June 2023

Dear Valued Client,

We are excited to introduce Intelligent Asset Management's Monthly Insights, a comprehensive digest that brings you expert opinions and analysis from our esteemed economists, strategists, and portfolio managers. This insightful publication aims to provide you with valuable insights to support your investment decisions, offering guidance regardless of your time horizon. Let us be your partner in making more informed choices as we navigate the ever-changing financial landscape together.

Sustainable Investing

A Paradigm Shift Towards Long-Term Value

Ferrera Trossard reveals how ESG integration reshapes finance for meaningful change and enhanced value.

Equities

ESG Investing: The Only Way Is Ethics – Or Is It?

ESG represents a form of investing that centres around companies that prioritise ESG factors.

Special Report

Should investors stay and fight for green change — or divest?

This academic study questions whether remaining engaged can often have a more significant impact.

Multi-Asset

ESG investment returns to face a slowdown in Q3

The factors driving the outperformance of green stocks are changing, our award-winning managers argue.

Investment Views

Why high-interest rates might be an aberration

Economist Urshan Phillips argues central banks are increasingly attuned to the risks of overtightening monetary policy.

Webinar

Watch the Unlocking Sustainable Investment Success Webinar

Chief Strategist Sally Urshing presents Intelligent Asset Management's five-year sustainability outlook.

Should you have any follow-up questions or require additional information, our dedicated team is here to assist you. Feel free to reach out to us via email at info.uk@profundcom.net or by phone at +44 20 7060 2140.

Rachel Assencio
Investor Relations
+44 20 7060 2140
info.uk@profundcom.net
Connect on LinkedIn

CORPORATE HEADQUARTERS

ProFundCom Ltd
207 Regent Street
Mayfair, London
W1B 3HH
UK

+44 (0)20 7060 2146
info.uk@profundcom.net

ProFundCom Inc.
350 5th Avenue
Suite 300, New York
NY 10118
USA

+1-212-710-1340
info.us@profundcom.net