

BANK OF AMERICA

Preferred Rewards

# Lifestyle Benefits from Preferred Rewards

A Partner Guide to Best Practices

August 2023

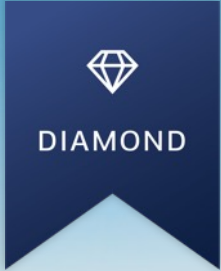
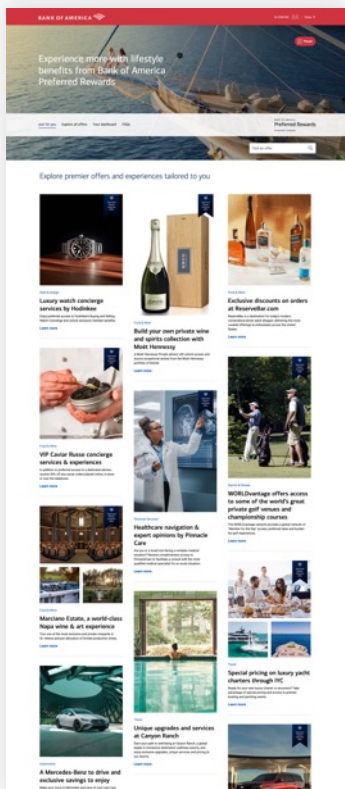


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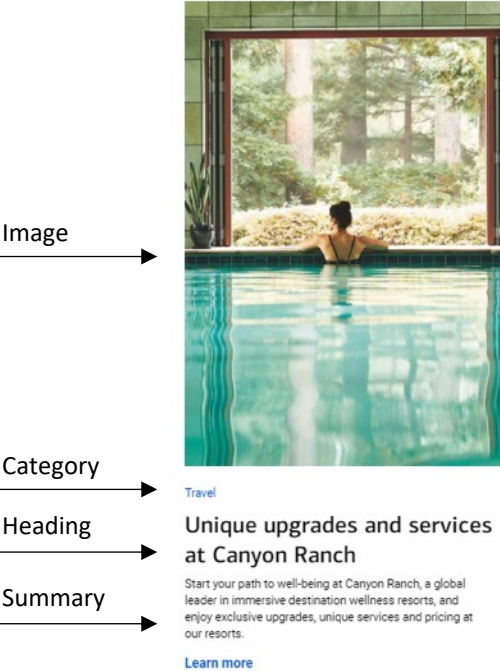
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# The Lifestyle Benefits Journey

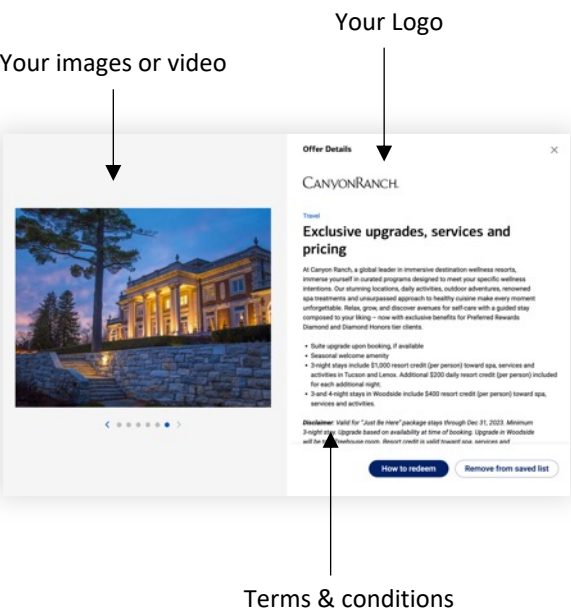
- 1 Access  
Members access your offer in multiple pages on the site



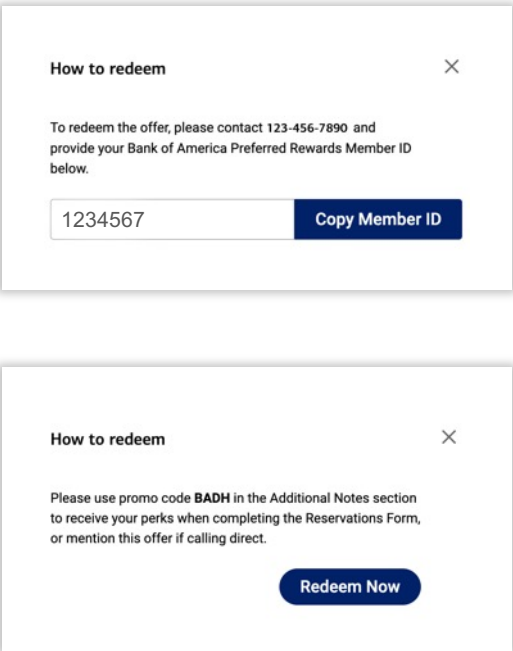
- 2 Offer tile  
Your “billboard” to compel members into learning more about you and your offer.



- 3 Offer details  
Pertinent offer info, plus terms and conditions, how to redeem and a handy “save offer for later” feature.



- 4 How to redeem  
Ask your representative how to describe the easiest way for clients to redeem your offer.





# Your offer tile should compel members to explore and redeem your offer

## Tiles


- Visually appealing image with strong focus
- Includes pertinent details (virtual tour; x% if you spend \$xxx)

## Headings

- No more than 2-3 lines with brand name (no logo)
- Tells rewards member “what’s in it for me?”

## Details

- Briefly describes offer in no more than 4 lines
- Mentions service provider (especially for access to a luxury brand)
- Enticing details (“exclusive member benefits”)
- Appeals to wealth clients without sounding elitist
- Uses friendly ad copy with active verbs and concise copy






Diamond Honors exclusive offer

**Luxury watch concierge services by Hodinkee**

Enjoy preferred access to Hodinkee's Buying and Selling Watch Concierge and unlock exclusive member benefits.

[Learn more](#)




Diamond Honors exclusive offer

**Special pricing on luxury yacht charters through IYC**

Ready for your next luxury charter or excursion? Take advantage of special pricing and access to premier boating and yachting events.

[Learn more](#)



Diamond Honors exclusive offer

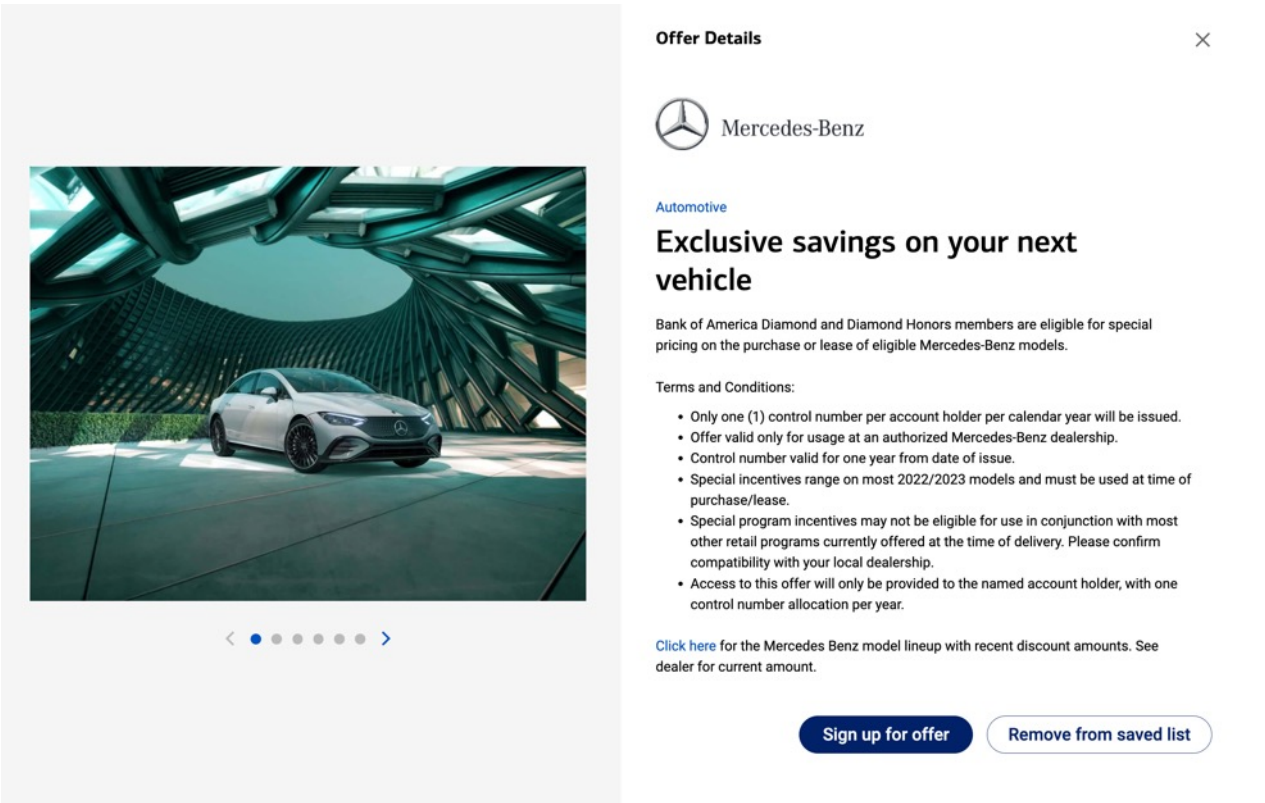
**Build your own private wine and spirits collection with Moët Hennessy**

A Moët Hennessy Private advisor will unlock access and source exceptional rarities from the Moët Hennessy portfolio of brands.


[Learn more](#)

# Offer details give members enough info and terms with easy way to say “yes”

- Logo: High-res in eps, jpeg format (transparent background)
- Heading: Brief and direct (don't repeat brand under logo)
- Reward summary: Concise, relevant details (dates/deadlines, discounts, caveats, spending reward)
- Offer details: Chunk info with varying words (beyond save, enjoy and exclusive) in subheads or bullets
- Legal asks: Label terms and disclaimers without jargon near the end of the offer details
- Interactive: Provide multiple images or a brand video



**Offer Details** ×

 Mercedes-Benz

Automotive

## Exclusive savings on your next vehicle

Bank of America Diamond and Diamond Honors members are eligible for special pricing on the purchase or lease of eligible Mercedes-Benz models.

**Terms and Conditions:**

- Only one (1) control number per account holder per calendar year will be issued.
- Offer valid only for usage at an authorized Mercedes-Benz dealership.
- Control number valid for one year from date of issue.
- Special incentives range on most 2022/2023 models and must be used at time of purchase/lease.
- Special program incentives may not be eligible for use in conjunction with most other retail programs currently offered at the time of delivery. Please confirm compatibility with your local dealership.
- Access to this offer will only be provided to the named account holder, with one control number allocation per year.

[Click here](#) for the Mercedes Benz model lineup with recent discount amounts. See dealer for current amount.

[Sign up for offer](#) [Remove from saved list](#)

## Make a strong first impression

- Headings should briefly answer for the member “what’s in it for me?”
- Use sentence case without punctuation
- Avoid abbreviations
- Brevity gets attention – Remove extra details and get to the point with short words that convey the offer with clarity and transparency

Headings



Automotive

### Save on your next Volvo

Enjoy \$500 towards the lease or purchase of a new Volvo, Certified Pre-Owned model, retired retailer demonstrator or service loaner.

[Learn more](#)

### DO

Napa wine showcase: Virtual tour and cabernet tasting

With EXPLORERSrUS, recharge at top-notch health spas in idyllic places

Design lovers: Save 20% and get décor advice with a VanDenBurke expert

### DON'T

Enjoy the Best Wine with a Free Wine Tour and Personal Tasting

EXPLORERSrUS offers access to all of the world’s most exquisite and exclusive medical health spa retreats

Enjoy huge savings and a private client consultation with our VIP design expert

## Our voice and tone speak to doers

- On first reference: Bank of America Preferred Rewards
- Refer to our clients as Diamond and Diamond Honor tier members
- Be direct and use active verbs. Speak in plain language for humans.
- Appeal to our most successful members and focus on “delivering a modern and premier service” that helps “power their ambitions”
- We think of these offers as “cohesive but distinct experiences”
- Focus marketing to “achievers” who want recognition for their success
- Use short subheads to chunk copy for ease in scan-ability
- Vary word choice and sentence structure with active verbs and polish
- Make your offer interesting and relevant for high-net-worth clients
- Avoid language that is too casual for the audience – this is totally awesome vs. specific and detailed description
- KISS – Keep it short and simple. Eliminate unnecessary details and fluff while highlighting your brand and offer

### DO

Try on a modern wardrobe with Custom Tailors VIP services

Rejuvenate and save \$500 with a week-long stay at Carlsbad MedSpa

Exclusively for Diamond Honors tier members, this offer expires....

### DON'T

We are pleased to invite you to experience the best of what we offer with creative expression and thoughtful expression in a VIP experience

Ultimate med spa experience

Exclusively for BofA clients, this offer expires....

- Active verbs add to a friendly and direct tone, plus shorten the copy
- Appeal to diverse wealth clients and highlight diversity when possible
- “Chunk” copy as needed for easier readability
- Avoid slang unless it's part of a widely advertised slogan

- List phrases in bullets without periods
- Use compelling language to describe your offer benefits and discounts in a way that's interesting but not verbose or using too many details
- Avoid jargon and redundant language and minimize legalese
- Use contractions (they use shorter words and soften your tone)



## Consistency is key: Dates and numbers

### Dates

- Don't separate months and years with a comma
- Avoid dates in numbers only (5/6/23 could mean June 5 to someone)
- Don't use "st," "rd," or "th" after the day

#### DO

January 2019

2 p.m.

Noon on January 6, 2006

45 minutes from Paris

Free 1-year offer

### Numbers

- We prefer numbers including 0 with a comma every 3 digits
- Avoid starting a sentence with a number but spell it out in that case. Exception: Headlines or space constraints.
- Time of day: Use a.m./p.m. with a space, and don't use ":00" without minutes

#### DON'T

12 p.m. on January, 2019

2:00 p.m.

12 p.m. on 01/06/06 or January 6<sup>th</sup>, 2006

45 min. from Paris

One year for free

## Crafting copy that reinforces our distinct approach

### Punctuation

- We don't use the Oxford (serial) comma unless it's needed for clarity (Ex: For lunch I had some soup, a salad, and a peanut butter and jelly sandwich.)
- Use a period for sentences but not phrases. Don't end bullets with periods or other punctuation.
- Ampersand: Prefer to spell out "and" instead of "&" for ADA reasons
- Avoid using exclamation points unless necessary

### Capitalization

- Don't use all caps unless it is required in copy with partner guidelines (even if it is portrayed that way in their logo)
- Use initial sentence case for all headlines

#### DO

Avis Presidential

Experience the beauty of Paris

Apples, oranges and pears

#### DON'T

AVIS PRESIDENTIAL

Experience the beauty of Paris and much more!

Apples, oranges, & pears

## Engage top members with your images

### Photography and image guidelines

- Ensure that your images represent your brand and the offer context
- Show a strong focal point supported by bright, natural lighting
- Lean toward soft neutrals and white coloration; judiciously use dark backgrounds
- Don't include any type or logos over your images
- Ensure that imagery is appropriate for the HNW/UHNW audience

### Specs for your images

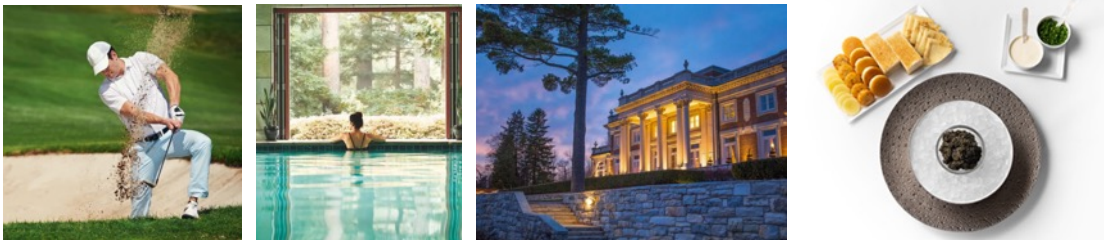
We need high-res PNG or JPG images with these dimensions:

- Recommended minimal width: 2,500 pixel 72dpi
- Recommended minimal height: 1,500 pixel 72dpi

Provide up to 5 high-res images so we can refresh your visuals and showcase your offer

- Single image (3 sizes) 382X340 382X420 382X560
- Multi-image block (3 distinct) 382X266 183X166 183X166
- Multi-image rotating (up to 5) 640X500

#### DO



#### DON'T



## Appeal to top members with your logo

### Your brand logos

- Provide high resolution images in approved formats (jpeg, eps)
- If available please provide CMYK and b/w versions with transparent backgrounds
- Some of our partners host branded microsites as a way to support their offer
- Please access Bank of America Preferred Rewards guidelines and logos

### Logos specs

- Recommended minimal width: 78 pixel
- Recommended minimal height: 34 pixel
- Format: JPG, PNG or SVG with transparent background

DO



Mercedes-Benz



THE EDEN RESIDENCE CLUB

DON'T





## Explain offers with maximum transparency (action, deadline, discounted services)

### Discounts

- Discounts (cash or %) and exclusions require consistent details and placement with clear written terms and conditions
- Offer details should include event dates and deadlines
- Substantiate any statements that set you apart (“award-winning”)
- Include spend amount requirements in the offer details
- Offer details must include conditions (you get this if you do that)

\*See LRC Approval Guidelines for complete offer requirements

### Memberships

- Content must mention any processing delays
- Offer details need to include qualifying payments and deadlines
- Obtain informed consent
- Mention any third-party providers
- Explain trial timeframe, not free trial; bold key terms/conditions

#### DO

Bring a friend for free when you book a European cruise of \$10,000 or more by Oct. 31, 2021. More terms apply

Get a 1-year complimentary membership and exclusive content access to AllPlaces Travel, lauded in USNews

#### DON'T

Bring a friend for free when you book a cruise now

Free membership to award-winning AllPlaces Travel

Save 25% off a new wardrobe from Ms. Ritz

# Use this handy checklist to boost your offers and avoid rework

- ✓ Does the offer reflect our Lifestyle Rewards tone, style and formatting?
- ✓ Did you clearly and concisely explain the offer in the heading and in the details?
- ✓ Does the copy clearly explain the offer? (event timing, access to a specialist)
- ✓ Did you include all dates in the offer details?
- ✓ Did you substantiate any claims that could be questioned? (award-winning, best product)
- ✓ Did you clearly explain exclusions, conditions, timelines and terms in a single section in Offer Details?
- ✓ Did you follow guidelines for numbers, dates, punctuation and formatting?
- ✓ Is the copy spelled correctly with proper grammar?
- ✓ Is the copy compliant with ADA and legal requirements?
- ✓ Can you provide at least 5 high resolution images in the sizes requested? And your logo on a transparent background?

If you answered YES above, now you are ready to complete your Lifestyle Benefits intake form.

Questions? Please reach out to your representative for assistance.