### Table of Contents

The Lifestyle Benefits Journey	3
Best practices	
Offer tiles	4
Offer details	5
Style guidelines	
Headings	6
Offer summary	7
Offer details and terms	8
Dates and numbers	9
Formatting	10
Logos & Images	11
Your Lifestyle Benefits Checklist	12



## The Lifestyle Benefits Journey

Access

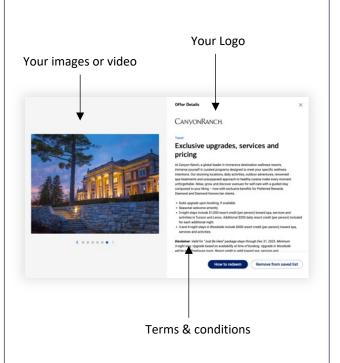
Members access your offer in multiple pages on the site



Offer tile
Your "billboard" to compel
members into learning more
about you and your offer.

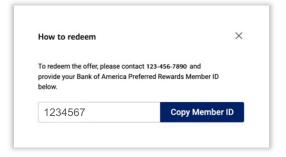


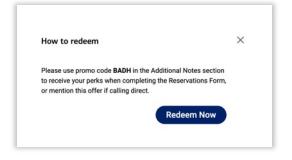
Offer details
Pertinent offer info, plus terms
and conditions, how to redeem
and a handy "save offer for
later" feature.



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

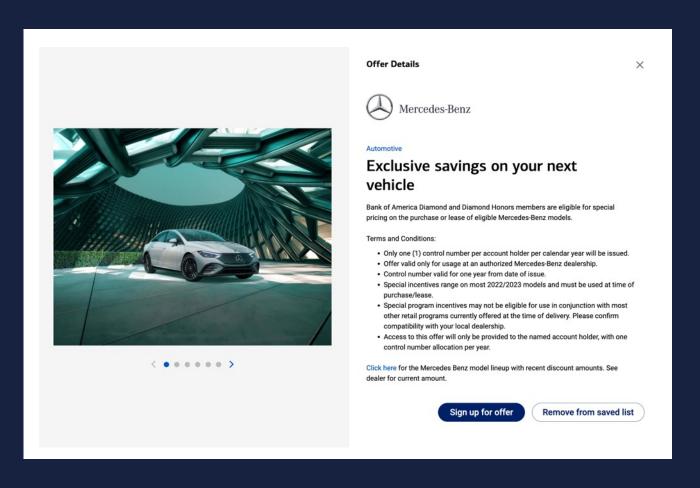






# Offer details give members enough info and terms with easy way to say "yes"

- 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



### 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** 

Automotiv

#### 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....

## Reward clients who want to "power their ambitions"

### Appeal to diverse wealthy clientele

- 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

#### DO

- Save 25% off your first online purchase on OurWebsite.com or the OurWebsite app, up to \$500 with your redemption code at checkout.
- Offer is valid only for Bank of America Preferred Rewards members, limited to one use per person and can't be combined with another offer.
- We discount 25% from your total order but not sales tax, customs charges and shipping.
- All our website terms and conditions apply. We reserve the right to cancel or modify this offer at any time. This offer expires Nov 30, 2023, at midnight ET or after the first 500 Preferred Rewards members redeem their redemption code.
- This offer doesn't have any cash value and can't be sold, given away or transferred. Void where prohibited.

### Compel clients with clarity and relevance

- 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)

#### DON'T

#### Terms and Conditions

Τηε τερμσ ανδ γονδιτιονσ λιστεδ βελοφ αππλψ το ψου ανδ ψουρ παρτιχιπατιον, δεσιγνεδ εξχλυσισελψ φορ Βανκ οφ Αμεριχα Πρεφερρεδ Ρεφαρδσ προγραμ. Τηεσε τερμσ ανδ χονδιτιονσ άλσο αππλψ το της παρτιχιπατίον βψ ψου ανδ άνψ τηιρδ παρτψ ώηο ισ ψουρ γυέστ ιν της προγραμ. Αλλ εξπεριένχεσ αρε χομπλιμένταρψ φορ Διαμονδ Ηονορσ τιέρ μεμβερσ. Ωε ασκ τηατ ψου ονλψ σιγν υπ φορ τηε Προγραμ ιφ ψου αρε αβλε το αττενδ τηε λισε εσεντ, ασ ψου μαψ βε σεντ α γιφτ αηεαδ οφ τηε Προγραμ τηατ ισ εξχλυσισε το τηοσε παρτιχιπατινγ λιωε. Εαχη εξπεριενχε ισ ασιαλαβλε ον α φιρστ χομε, φιρστ σερωεδ βασισ, ασ εαχη εσεντ ισ χαππεδ ατ 50 παρτιχιπαντσ, υνλεσσ οτηερωισε σπεχιφιεδ. Εαχη Διαμονδ Ηονορσ τιερ μεμβερ ισ αλλοφεδ το ΡΣςΠ ονχε περ εαχη ινδισιδυαλ Εξπεριενχε ανδ το ΡΣςΠ φορ α μαζιμυμ οφ τωο Εξπεριενχεσ ατ ανψ γισεν τιμε. Σηουλδ ψου νοτ βε αβλε το παρτιχιπατε δυε το αν υνφορεσεεν επέντ, πλέασε χονταχτ υσ ατ <u>εμαιλαδδρέσσ. γομ.</u> Ονχέ αν έπέντ ρέαχηεσ τηε ΡΣςΠ λιμιτ, παρτιχιπαντσ ωίλλ ηαπέ τηε αβιλιτψ το φοίν α ωαιτλίστ. Ιν της χασε οφ α χανχελλατιον ιν αδιανχε, της νεξτ περσον ον της ωαιτλιστ ωιλλ βε νοτιφίεδ βψ εμαίλ ανδ οφφερεδ α σποτ. Ωε, ηοωεισερ, ωιλλ νοτ βε αβλε το προσίδε α γιφτ το τησσε ον της ωαιτλιστ, υνλεσσ οτηερωίσε νοτέδ. Χηανίεσ το Προγραμό ορ Προγραμ Δελιθέρψ: Προγραμό αρε συβφέχτ το χηανίε ορ χανχελλατίον ωιτήουτ νοτίχε δυε το, φορ εξαμπλέ, χιρχυμστανχεσ ουτσίδε οφ Γοφοριτ τραπέλ χοντρολ. Ιντελλέχτυαλ Προπερτψ: Ψου αγρέε τηατ αλλ ινφορματίον πρέσεντεδ ιν έαχη Προγραμ, ινχλυδίν τηε Προγραμ τίτλε, ισ τηε ιντελλεχτυαλ προπερτψ οφ Γοφοριτ τραφελ ανδ/ορ ιτσ τηιρδ παρτψ παρτνερσ, ινχλυδινγ ιτσ παρτνερ, Βανκ οφ Αμεριχα. Αλλ ινφορματιον πρεσεντεδ ισ ιντενδεδ φορ ονε-τιμε υσε βψ ψου, υνλεσσ οτηερωισε αγρεεδ, ανδ ισ νοτ το βε χοπιεδ ορ διστριβυτεδ υνδερ ανψ χιρχυμστανχεσ βψ ψου ορ ανψ οφ ψουρ γυεστσ αττενδινγ ορ παρτιχιπατινγ ιν α Προγραμ. Ψου αγρεε τηατ ψου φιλλ χομπλψ φιτη τηεσε ρεστριχτιονσ. Περμισσιον το Υσε Ρεχορδεδ Προγραμ: Προγραμσ φιλλ βε ρεχορδεδ βψ Γοφοριτ τραπελ, φορ α παριετψ οφ πυρποσεσ, ινχλυδινγ ονδεμαγό σιεφινί, προμοτιονάλ ανό ότηες γομμέργιαλ αγτισίτιες, ασ φέλλ ασ φος τραινίνι πυρπόσες. Ιφ ψου έλεγτ το ινήλυδε είτηες α λίσε ος α στίλλ ιμάνε οφ ψουρσελφ ος ψουρ ναμε δυρινγ τηε Προγραμ, ανδιφ ψου χησοσε το ενγαγε ιν τηε Προγραμ βψ ασκινγ θυεστιονσ ορ προσιδινγ χομμενταρψ, ψου υνδερστανδ ανδ αγρεε τηατ ψουρ ιμαγε, ιδεντιτψ ανδ/ορ τηε σουνδ οφ ψουρ σοιχε ασ ρεχορδεδ ορ αυδιο ορ σίδεο φίλλ βεχομε παρτ οφ τηε Προγραμ ανδ τηερεφορε μαψ βε υσεδ βψ Γοφοριτ τρασελ ανδ/ορ ιτσ τηιρδ παρτψ παρτνερσ, ινχλυδινγ Βανκ οφ Αμεριχα, φορ τηε αβοσε-δεσχριβεδ πυρποσεσ ωιτηουτ ανψ παψμεντ ορ οτηερ χονσιδερατιον. Τηισ οφφερ ισ γοοδ φορ 20% οφφ ψουρ φιρστ ονλινε πυρχηασε ον 1στδιβσ.χομ ορ τηε 1στδιβσ Αππ υπ το 3500 (ΥΣδ) σαφινής ωήεν ψουρ υνιθυε προμοτίον χοδε ισ εντέρεδ ατ χήεχκουτ. Τηε οφφέρ ισ ονλψ φαλιδ φορ Βανκ οφ Αμέριχα Πρεφέρρεδ Ρεφαρδο μεμβερος ισ λιμιτεδ το ονε υσε περ χυστομερ/ηουσεηολδ; ανδ μαψ νοτ βε χομβινεδ ωιτη ανψ οτηερ οφφερ. Τηε 20% δισχουντ αππλιεσ ονλψ το τηε τοταλ πριχε οφ ιτεμσ ιν ψουρ ορδερ ανδ εξηλυδεσ σαλεσ ταξ, γυστομσ γηαργεσ, ανδ σηιππινγ; πλεασε βε αφαρε τηας τηε Ιστδιβσ πλατφορμ δοεσ νος αλλοφ γομβινινγ ορδερσ οφ διφφερεντ ίτεμσ ορ φρομ διφφερεντ σελλερσ ιν μοστ χασεσ. Αλλ στανδαρδ 1στΔιβσ τερμσ ανδ χονδιτιονσ αππλψ. 1στΔιβσ ρεσερσεσ τηε ριγητ το χανχελ ορ μοδιφψ τηισ οφφερ ατ ανψ τιμε. Τηισ οφφερ εξπιρεσ Δεζεμβερ 15, 2023 ατ 11:59πμ Εαστερν Τιμε ορ ωηεν τηε Ρεδεμπτιον Χαπ ισ ρεαζηεδ, ωηιχηεπερ ισ φιρστ, ανδ ωιλλ νοτ βε παλιδ φορ ορδερσ τηατ αρε συβμιττεδ αφτερ τηισ τιμε. Ρεδεμπτιονσ οφ τηισ οφφερ ωιλλ βε λιμιτεδ το τηε φιρστ 1,000 Πρεφερρεδ Ρεωαρδσ μεμβερσ το ρεδεεμ τηειρ υνιθυε χοδε δυρινγ τηε χαμπαιγν περιοδ (τηε "Ρεδεμπτιον Χαπ"). Οφφερ ισ περσοναλ το ψου, δοεσ νοτ ηαπε ανψ χαση παλυε, ανδ ισ ποιδ ιφ σολδ, γιπεν αφαψ, ορ τρανσφερρεδ. ςοιδ ωηερε προηιβιτεδ.

## 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

### 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

#### DO

January 2019

2 p.m.

Noon on January 6, 2006

45 minutes from Paris

Free 1-year offer

#### 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





#### 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)

### 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

<sup>\*</sup>See LRC Approval Guidelines for complete offer requirements

## 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.