

BANK OF AMERICA

Preferred Rewards

Lifestyle Benefits from Preferred Rewards

A Partner Guide to Best Practices

August 2023

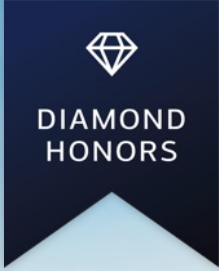
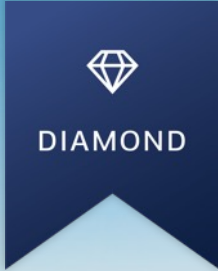


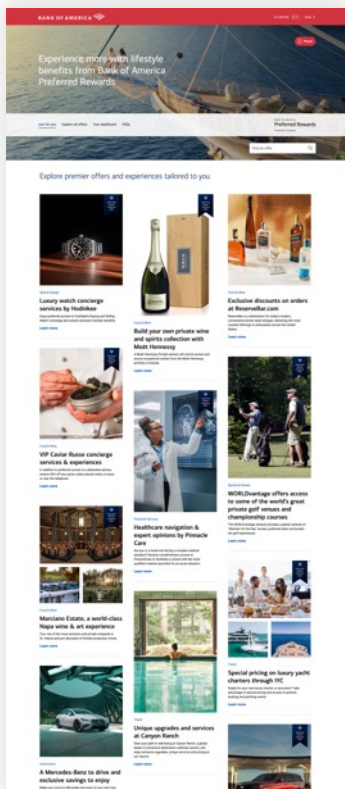
Table of Contents

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

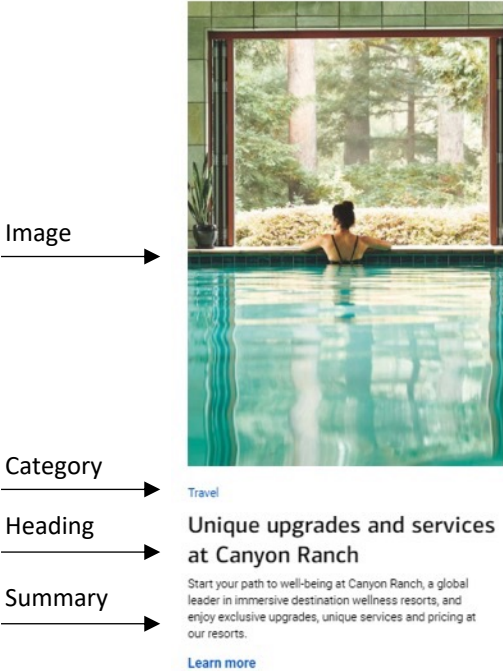


The Lifestyle Benefits Journey

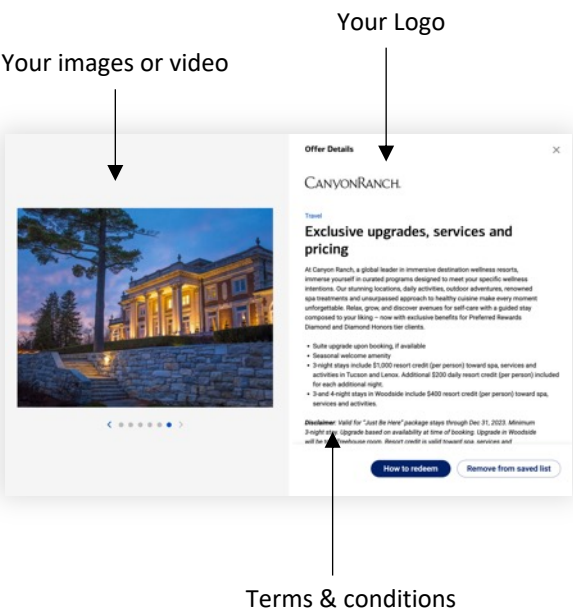
- 1
- Access
Members access your offer in multiple pages on the site



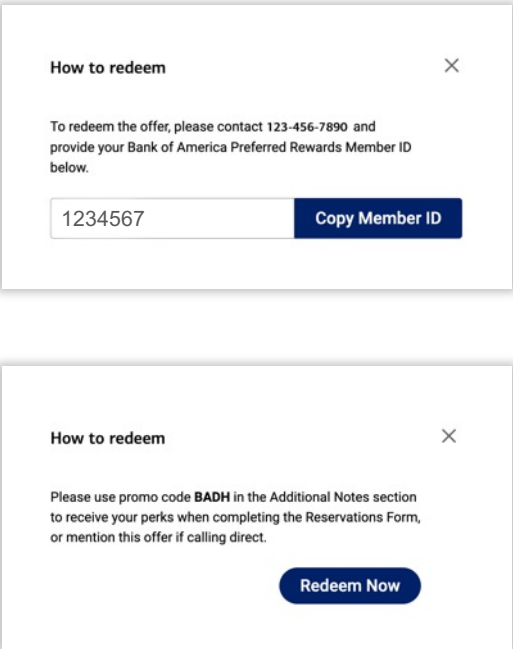
- 2
- Offer tile
Your “billboard” to compel members into learning more about you and your offer.



- 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

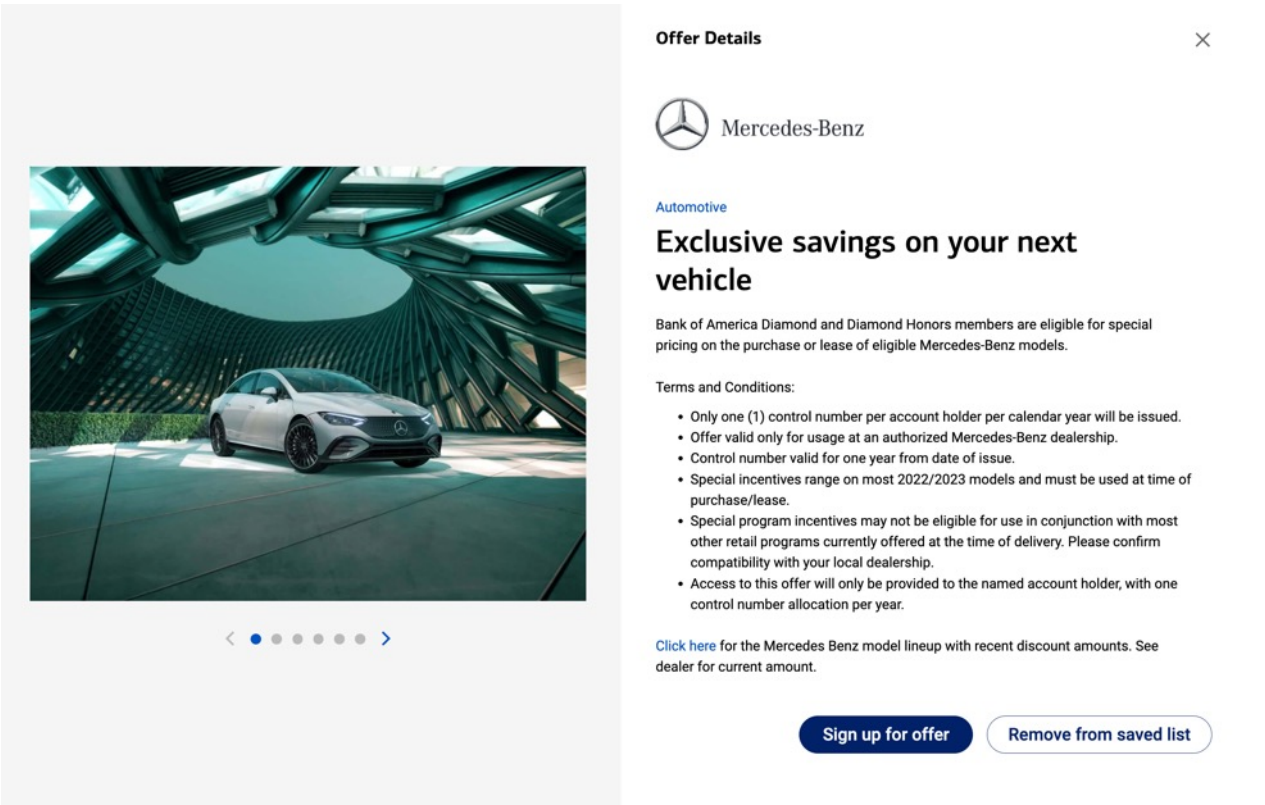
Build your own private wine and spirits collection with Moët Hennessy

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)

- 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.

[illegible]

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 6th, 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

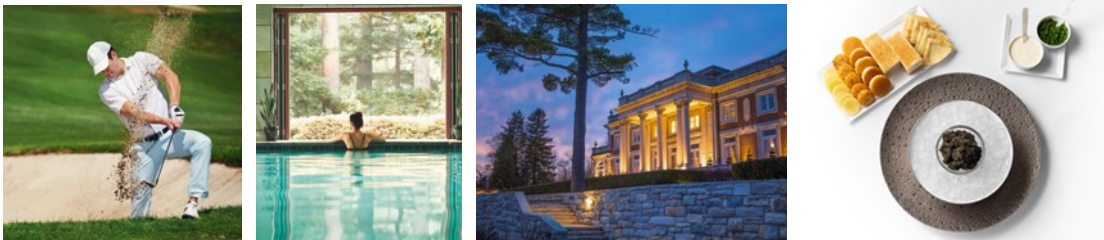
We need high-res PNG or JPG images with these dimensions:

- 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

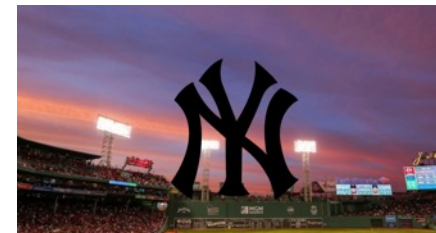


Mercedes-Benz



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.