

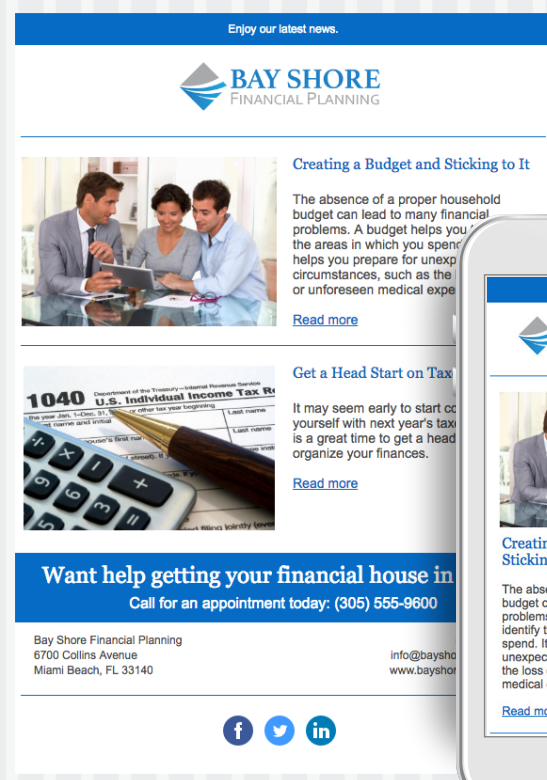
# EMAIL CONTENT IDEAS FOR ACCOUNTANTS / FINANCIAL ADVISORS

Constant Contact

Seasonal Reminders →

Important Financial News →

Request a Referral →



Enjoy our latest news.

**BAY SHORE**  
FINANCIAL PLANNING

**Creating a Budget and Sticking to It**

The absence of a proper household budget can lead to many financial problems. A budget helps you identify the areas in which you spend, so you can prepare for unexpected circumstances, such as the loss of a job or unforeseen medical expenses.

[Read more](#)

**Get a Head Start on Tax**

It may seem early to start organizing your finances for next year's tax season, but it is a great time to get a head start on organizing your finances.

[Read more](#)

**Want help getting your financial house in order?**  
Call for an appointment today: (305) 555-9600

Bay Shore Financial Planning  
6700 Collins Avenue  
Miami Beach, FL 33140

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www.bayshore.com

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## Seasonal Reminders

Remind clients of key financial planning dates along with relevant tips and how you can help

### Subject Line:

Upcoming deadlines & important [TAX] season notices

### Recommended Template:

Image Focus Newsletter

### Call-to-Action:

- Submit a question
- Share with friends and family
- Read more

### Business Result:

- Remind clients of your expertise
- Increase customer loyalty
- Gain referrals



### Suggested mailing schedule:

Send seasonally (4-6 times a year as needed)

# Important Financial News

Highlight important news topics that are relevant to your clients and offer them your assistance

**Subject Line:**

News & updates you need to know

**Recommended Template:**

Texty Newsletter

**Call-to-Action:**

- Book an appointment
- See full story
- Share with friends and family

**Business Result:**

- Showcase your expertise
- Stay connected with clients and increase repeat business
- Gain new clients through shared emails



**Suggested mailing schedule:**

Once a month

**BAY SHORE FINANCIAL PLANNING**

**Get Out of Debt and Back In Control of Your Finances**

Financial freedom starts with the end of debt. Budgeting can help you reduce consistently to pay it off as quickly as possible. It can also help you save money on unexpected financial situations.

[Book an appointment](#) for more information on how BayShore Financial Planning can help you with your debt management.

**Retirement Planning Success Stories**

Harry was 45 with nothing in his savings account. He knew that he had to start thinking about retirement, but he had no idea where to start.

Find out how we helped him save over \$100,000 in just a few short years. Read Harry's [success story!](#)

**Want to start planning for your retirement?**  
Call us now at 555-555-5555

Follow us on social media for more tips!

[f](#) [t](#) [in](#) [g+](#)

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# Request a Referral

Request referrals from your clients and offer an incentive to those that refer your business

**Subject Line:**

Help your friends & family get the best financial advice

**Recommended Template:**

Basic Newsletter

**Call-to-Action:**

- Refer a friend, family member or colleague
- Share this email

**Business Result:**

- Gain new clients
- Increase revenue



**Suggested mailing schedule:**

Once every quarter

**BAY SHORE FINANCIAL PLANNING**

**Help Us Help Others**

It's never fun to hear about financial struggles your friends endure. It can make you feel sad and helpless when there's nothing you can really do to help them get out of the debt.

But you CAN help!

You can stop feeling sad and helpless. With our help, you can help your friends who are suffering financially.

All you have to do is refer a friend, family member or colleague.

[Referral Link](#)

**You Help Us - We Help You**

As a thanks for helping us help more people with their finances, we will give you \$25 for every client that signs up for debt management or financial planning with us.

[Learn more here!](#)

Know a friend who knows people who need help?  
[Share this email.](#)

Follow us on social media

[f](#) [t](#) [in](#) [g+](#)

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