



Lloyds FP&R

Comms journey

Lloyds desktop and mobile

Subject line option 1:

#Name#, a timely reminder to make the most of your money

Preheader option 1:

Let us help you take advantage before the tax year ends.

Subject line option 2:

#Name#, make the most of your money before the tax year ends

Preheader option 2:

We have the expertise and products to help target your future.

Header:

Now's the time to get more from your money




Alternatives:

Fund your future before the tax year ends

The time to fund your future is now. We can help.

We could help your future before the tax year ends


We have a wealth of ways to help your future



#Name#

No matter how far ahead you've planned your future, we're here to help your money grow. The financial year's coming to an end, but there's still time to use your annual £20,000 ISA allowances. And whether you're investing, topping up your pension or both, you can do it all tax efficiently with Lloyds Bank.


From Stocks & Shares ISAs to ready-made investments and pensions, we have a full range of products that could help you realise your goals. You can even benefit from expert financial planning and investment advice, thanks to our partnership with Schroders Wealth. See more below.



Share Dealing ISA

In each tax year you can save or invest up to £20,000 in an ISA, and a Share Dealing ISA is a powerful and super-efficient way to invest. You don't pay UK tax on any potential profit or dividends and it's self-select, meaning you decide exactly what you'd like to invest in. Just keep in mind there's some risk involved with investing, but there's also potential for higher returns than through savings.


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Ready-made investments

Our ready-made investments can help you diversify your money across a range of markets without you doing the hard work of researching and selecting. Just remember, there's risk involved with any investment, but you can choose the fund with the risk level you're comfortable with – low, medium or high. Hold it in an Investment ISA or Investment Account, and we'll do the rest.


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Schroders Personal Wealth

Having a financial plan is the smart way to achieve your goals faster. Through our partnership with Schroders Personal Wealth, we want to give more of our customers access to financial planning and investment expertise to help bring your hopes and plans to life. Fees and charges apply for the service, but it all starts with a free, no-obligations 15-minute call.


[LET'S TALK](#)



Pensions

Got one eye on your future? Have you thought about exploring your pension options? Bringing your pensions into one place, for example, makes life simpler and might even save you money. And remember, you don't pay income tax on money you pay into pensions, or on the amount they grow. Working with our pensions experts at Scottish Widows, we can help you decide what's right for you.


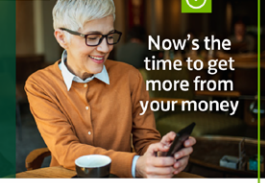

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Add us to your address book to make sure you receive our emails.

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If you no longer wish to receive emails from us, you can unsubscribe here.

Halifax desktop and mobile

Subject line option 1:

#Name#, think your money could work harder?

Preheader option 1:

We could help you take advantage before the tax year’s up.

Subject line option 2:

#Name#, the best time to fund your future is now

Preheader option 2:

We could help you take advantage before the tax year ends.

Header:

The tax year ends soon.

We could help your future now.

Get in.

Alternatives:

Want more from your money?

We have a wealth of ways to help.

Sorted.

The tax year ends soon.

Let’s make time to help your future.

Nice one.

Topping up for your future?


Let us help before the tax year ends.

Get in.


We could help you take advantage before the tax year’s up.

So you know this email is genuine, we’ve included part of your postcode: **** 30P.
Find out more about how to protect yourself from email scams.

Credit card ending #XXXXX




The tax year ends soon.
We could help your future now.
Get in.



#Name#,

Planning ahead? Looking to grow your money? The financial year’s coming to an end, but there’s still time to use your annual £20,000 ISA allowances. And whether you’re investing, topping up your pension or both, you can do it all tax efficiently with Halifax.


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Tell me more



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I'm interested



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[Text link 1](#) | [Text link 2](#) | [Text link 3](#)


We could help you take advantage before the tax year’s up.

So you know this email is genuine, we’ve included part of your postcode: **** 30P.
Find out more about how to protect yourself from email scams.

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