



## Promotional Language - General

**COPY:** Do you know the four things that define your financial personality? Uncover the unique drivers of your financial happiness. Take this 3-minute, scientific financial personality assessment today for a more satisfying financial plan tomorrow.

**Call To Action (CTA):** Take the Assessment (*insert or underlay hyperlink*)

**COPY:** Discover the four factors that define your financial happiness. Take this 3-minute, scientific financial personality assessment.

**Call To Action (CTA):** Take the Assessment (*insert or underlay hyperlink*)

Help me learn more about you so I can serve you better. Take the Financial Personality Assessment and let's talk about how to better align your portfolio with your values.

**Call To Action (CTA):** Take the Assessment (*insert or underlay hyperlink*)

## Social Media/Web Promotional Copy

**COPY:** Do your finances align with your values? Discover how to align your investments with what matters most to you. Take a short financial personality assessment to learn more.

**Call To Action (CTA):** Take the Assessment (*insert or underlay hyperlink*)

**COPY:** Are you interested in purpose investing but not sure how to align it with your investing. Take a short financial personality assessment to take the first step in aligning what matters most to you with your investments.

**Call To Action (CTA):** Take the Assessment (*insert or underlay hyperlink*)

**COPY:** Your money can do more than fund your financial goals. Take this 3-minute financial personality assessment to connect what you value with your financial plan to achieve financial happiness.

**Call To Action (CTA):** Take the Assessment (*insert or underlay hyperlink*)

**COPY:** Do you really know what you're invested in? Are your investments aligned to your unique preferences? Take this 3-minute scientific financial assessment to discover your unique financial personality.

**Call To Action (CTA):** Take the Assessment (*insert or underlay hyperlink*)



**COPY:** You deserve an advisor who understands your unique viewpoints. Ready for a deeper conversation? Take this 3-minute scientific financial assessment to discover your unique financial personality.

**Call To Action (CTA):** Take the Assessment (*insert or underlay hyperlink*)

**COPY:** Have you thought about working with a financial advisor, but are not sure where to begin? Take the personality assessment in the link below as a first step, and we can follow up with a complimentary consultation at your convenience.

**Call To Action (CTA):** Take the Assessment (*insert or underlay hyperlink*)

**COPY:** I invite you to take a short financial personality assessment. This will help me gain more insight into who you are, what drives you and how I can help you meet your financial goals by investing in what matters most to you – whether that’s purpose, security, or your unique viewpoints.

**Call To Action (CTA):** Take the Assessment (*insert or underlay hyperlink*)