Liza J. Lee | 604.728.8834 | Vancouver, Canada | LizaJLee.com@gmail.com | LizaJLee.com | LinkedIn/in/lizajlee

Copywriting Samples: Financial Services & Fintech

Copywriter for Vancity: Financial Services and enviro Visa Credit Card – 2026

Content Strategist & Copywriter: Binary Stream for Dynamics 365 ERPs – 2019

Copywriter for Beanworks: AP Automation for Sage Intacct ERP – 2019

Copywriter for Symcor: Fintech Security for Financial Services – 2017

UX Writer for BCAA: Home Insurance Quote Landing Page – 2018

Copywriter for BCAA: MBNA Mastercard Credit Card – 2001

Copywriter for Data Driven Marketing: Enrich Academy Email and Facebook Ads – 2020

Liza J. Lee | 604.728.8834 | Vancouver, Canada | LizaJLee.com@gmail.com | LizaJLee.com | LinkedIn/in/lizajlee

Vancity

Copywriter for Vancity: Financial services and enviro Visa Credit Card – 2026

Provided enviro Visa sales guide for branch representatives to assist customers with their best option.

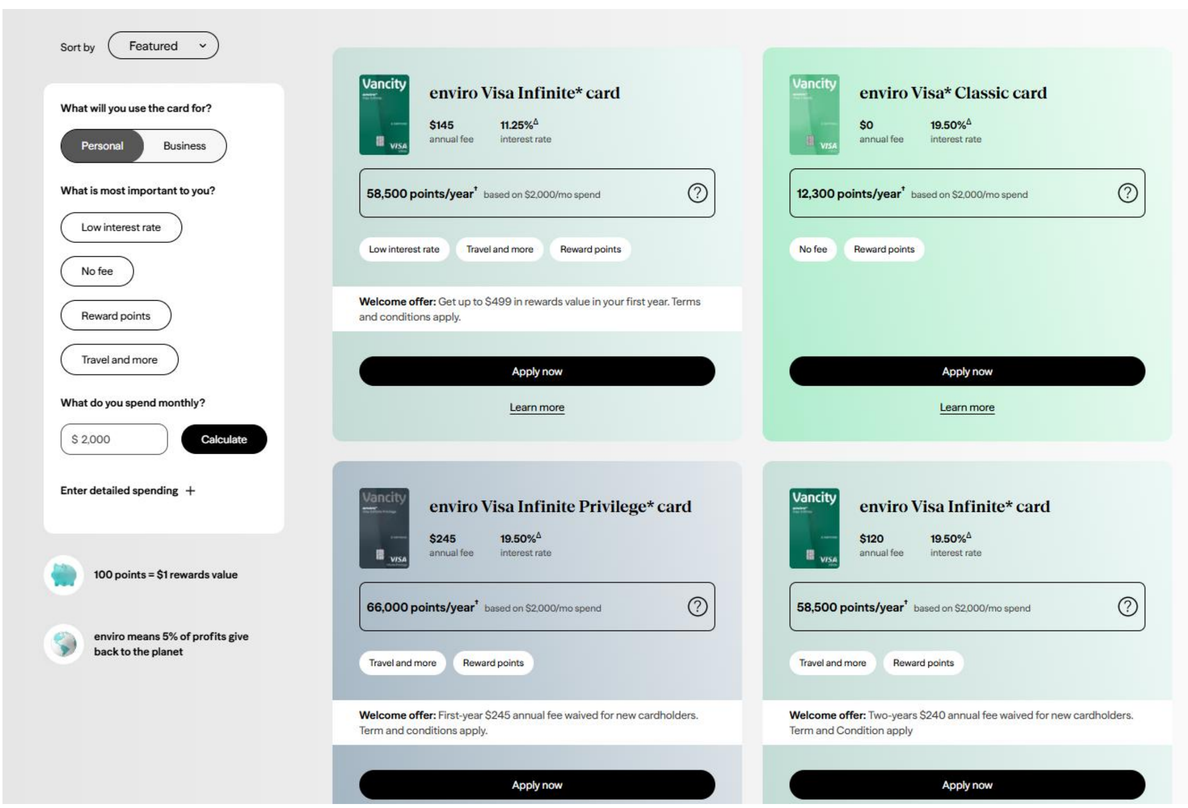
Reasons to love Vancity Rewards.

Get the same rewards value
Every 100 Vancity Rewards points gets you $1 in value, no matter what you choose to redeem your points for.

Diverse reward options
Choose what you want to redeem your rewards for: cash back travel, charitable donations, or gift cards.

Flexible travel
Earn double rewards when you use your Visa card to book flights, hotels, and car rentals through rewards.vancity.com. No blackout dates or booking fees.

No cap on rewards
Keep earning points at the same great rate with no maximum limit.



Industry
Credit Union

Company Size
Over 2,500 employees

Financial Services
enviro Visa

Liza J. Lee | 604.728.8834 | Vancouver, Canada | LizaJLee.com@gmail.com | LizaJLee.com | LinkedIn/in/lizajlee

Copywriter for Vancity: Financial services and enviro Visa Credit Card – 2026

Provided enviro Visa sales guide for branch representatives to assist customers with their best option.

Vancity enviro™ Visa* cards at a glance.

	enviro Visa Classic* Low interest rate	enviro Visa Classic* Regular interest rate	enviro Visa* Gold Regular interest rate	enviro Visa Infinite* Low interest rate	enviro Visa Infinite* Regular interest rate	enviro Visa Infinite Privilege* Regular interest rate
Great for	Cardholders (no income requirements) who occasionally carry a balance	Credit-builder cardholders (no income requirements) who want a no-fee card and earn rewards	Cardholders (no income requirements) seeking more rewards	High-spend cardholders (minimum 60K personal income/120K household income) who carry balances	Cardholders (minimum 60K personal income/ 120K household income) seeking better rewards and travel benefits	High-spend cardholders (minimum 120K personal income/ 240K household income) seeking the most premium card
Key benefits	Lower interest rate to help manage balances	No annual fee and suitable for cardholders new to credit.	Welcome bonus after first purchase	Lower interest rate for greater flexibility	Travel, Visa Infinite Dining Series, and lifestyle perks	Top-tier premium Access® Rewards and exclusive benefits
Rewards	Earn 1 point for every $2 spent on purchases	Earn 1 point for every $2 spent on purchases	Earn 1 point for every $1 spent on purchases	Earn 1.25 points or more for every $1 spent on purchases	Earn 1.25 points or more for every $1 spent on purchases	Earn 1.5 points or more for every $1 spent on purchases
Additional perks	Save on interest while still earning rewards	Simple card with essential benefits	Annual bonus points on anniversary and premium rewards experience	Comprehensive travel insurance, Complimentary Concierge services, and exclusive card benefits	Comprehensive travel insurance, Complimentary Concierge services, and exclusive card benefits	Premium travel, insurance, Complimentary Concierge services, and exclusive perks

Rewards can be redeemed for cash back, travel, charitable donations, or gift cards. A Vancity membership is required for certain cash back rewards. Must have a Vancity deposit account to redeem for cash back. Additional terms and conditions apply.

Visit vancity.com for more information.

Industry
Credit Union

Company Size
Over 2,500 employees

Financial Services
enviro Visa

Content Strategist & Copywriter: Binary Stream for Dynamics 365 ERPs – 2019

- Developed and wrote the content strategy and copywriting for Binary Stream products
- Managed deliverables including brief, budget, timeline and creative execution
- Promoted company brand, communications, case studies and white papers
- Optimized PPC, SEO, SEM, landing pages, emails and social media

---

Multi-Entity Management for Dynamics 365 Business Central

Extend Your ERP for Multi-Entities.

Real-time Consolidated Financials

Growing your company is good. However, facing the spiraling costs of maintaining your stretched accounting system can be challenging. Whether your firm is growing by acquisition or expansion, Multi-Entity Management (MEM) makes adding a new company to your accounting set-up a breeze.
Stop wondering how your company is really performing:

- Get real-time insight into your company's health with rolled-up financial reports across all your companies
- Ability to centralize the processing of payments, receipts, invoicing, and purchase orders
- Can be deployed in the cloud, in a hosted environment or on-premise

Expertise in Microsoft Technologies

By developing entirely in Microsoft technologies, Binary Stream creates innovative solutions, added performance and security enhancements, while utilizing the same Microsoft Dynamics look and feel users know and trust. Our software development teams work in an agile framework for our Microsoft Dynamics add-ons. This enables us to deliver product releases regularly with iterative improvements.

MEM Functional Areas

- Sales
- Purchasing
- Journals
- Reporting by Entity
- Inventory
- Intercompany through Head Office • Fixed Assets
- Manufacturing

MEM Advantages

- Centralized Payment
- Centralized Receipt
- Centralized Invoicing
- Centralized Purchase Order
- Security by Entity
- Intercompany Transactions

"We were able to grow from 55 entities to 239 while saving $126,000 per year by eliminating user inefficiencies and downtime obstacles."

Bill Breitenbach IT Director, Signature Healthcare

Improve Efficiencies for Various Roles

Low Maintenance for Technical Team:

- Easy Upgrades
- Uses Cloud Resources

Full Feature Set for Users:

- Embedded in Dynamics 365 Business Central
- User and Entity-based Security
- Allocate to Multiple Entities

Centralized Processing for Managers:

- Centralized Payment Processing
- Centralized Receipt Processing

Corporate Performance for Executives:

- Insights into Entities
- Consolidated Reporting for Many Entities

Over 1900 Companies Globally Trust Binary Stream – Award-Winning ISV

Business in Vancouver: BC's Top 100 Technology Companies; PROFIT 200: List of Canada's Fastest-Growing Companies; CDN Channel Elite: Best Mid-Market Solution Finalist; and Burnaby Board of Trade: Finalist Award for Business of the Year 2018

Since 2001, Binary Stream Software has been a Microsoft Gold Certified independent software vendor (ISV) providing comprehensive industry and enterprise-grade ERP functionality to extend the capabilities of Microsoft Dynamics GP, Microsoft Dynamics 365 for Finance and Operations, and Microsoft Dynamics 365 Business Central.

Binary Stream has Microsoft's highest honor of the prestigious President's Club in 2007, 2008, 2009, 2010, 2012, 2014, 2015, and 2016, as well as ISV of the Year Finalist twice for Canada. We are among the top 5% of Microsoft Dynamics partners worldwide because of our commitment to client success.

Ready to Learn More?

See capabilities and benefits Multi-Entity Management can bring to your company.

Book a demo with one of our Account Managers today at 604.522.6300.

+1-604-522-6300
sales@binarystream.com
www.binarystream.com

Industry
Fintech

Company Size
Over 80 employees

Accounting Software
Binary Stream

Copywriter for Beanworks: AP Automation for Sage Intacct ERP – 2019

Researched, wrote and edited copy for Beanworks case studies.

Beanworks AP Automation with Sage Intacct Saves Three to Five Minutes Per Invoice for Home Point Financial

Home Point Financial is a national, multi-channel mortgage originator and servicer in the United States, with corporate headquarters in Ann Arbor, Michigan. Its lending focuses on speed and consistency for our customers and partners, combined with superior customer service. The company offers reverse mortgages, conventional loans, and refinancing services. Founded in 2015, it has evolved rapidly into a distributed and diverse workforce of over 1000 employees and is licensed in all 50 states.

CHALLENGE

Accounts payable (AP) is one of the most frustrating and time-consuming parts of accounting and adopting AP automation software is a challenge across Home Point Financial's five offices with multiple time zones and multiple departments. The company was concerned with the integration of an AP automation software into its existing accounting system for a centralized AP solution and company-wide user adoption to standardize operations.

DECISION

Bill Fisher, Controller of Home Point Financial explained their decision: "We needed to look into an AP automation solution to standardize our processes, to add some more structure, to track outstanding items and report on it to give the business a standard way of operating, rather than invoices coming to them directly from a vendor or customer".

One of the most important factors in choosing Beanworks was the capability to automate the entire AP process and view AP-related data in real-time basis. For Home Point Financial, this is critical to the business as AP staff get questions constantly about the status of an invoice or payment, especially when there are rushes, outside of standard timelines.

With Beanworks, AP staff can log in and provide inquirers an instant status update anytime and in real time. Home Point Financial also trained its staff company-wide to use Beanworks so inquirers are able to check on their own for the status of invoices, approvals and payments themselves. This saves time for all AP staff, approvers, vendors and suppliers.

IMPLEMENTATION

Beanworks provides end to end AP automation for Sage Intacct, the general ledger system where all of the general ledger activity is recorded for Home Point Financial. Sage Intacct is an enterprise-grade cloud-based accounting ERP software that can deliver efficiencies and insights for companies to help them grow from their first million to their first billion.

Invoices processed through Beanworks automatically creates the journal entries in Sage Intacct, whether entering the invoice or the payment, as both systems are seamlessly integrated for a consolidated AP system. Home Point Financial Corporation AP staff can go into Beanworks for paid invoices in the networks, pull the payment, and see everything that was paid, screenshot the payments and send them back to inquirers.

AP staff could process to set up AP workflows in Beanworks, while ensuring due diligence in the Sage Intacct. This means the AP process remains the same in Sage Intacct, as data flows over to Beanworks where invoices are entered. When these are completed and approved, they flow back and sync to the Sage Intacct general ledger for a seamless process.

Regarding the effectiveness of modernizing the entire consolidated AP process, from the purchase decision to invoice approval with electronic payments, Bill Fisher, Controller says, "I can honestly say that with Beanworks, AP automation actually happened and everything we wanted from it. We did it faster than planned. So it has delivered its promises and continues to."

ACHIEVEMENTS

Beanworks lived up to its value proposition to streamline AP with "Code. Approve. Pay"**,** enabling all AP associates across Home Point Financial to use Beanworks daily and logging into it is the first thing they do to process invoices. Also, the company's coding team uses Beanworks for accruals, to pull each invoice and make sure they were coded correctly. Finally, the AP manager and all higher-level AP associates who are the approvers also use Beanworks.

Before Beanworks, the company had a shared AP mailbox where all AP specialists could access it. They received invoices, scanned them into the AP system, and one staff would monitor the mailbox, and send out every single invoice manually via email for approvals. Then after waiting for approvals, there would be follow up emails for outstanding approvals. This was a manual and tedious process to get needed approvals. After approvals, AP staff matched the invoices to the downloaded approvals, and uploaded them into Sage Intacct. Finally, they could key in the data entry of invoices. This all took a lot of work upfront before paying any invoices.

The process before Beanworks AP automation meant AP associates were processing invoices every day of the work week. After integrating Beanworks into the AP system with Sage Intacct, AP associates can break up invoice payments into two days and work on other tasks for the other three days of the work week. Beanworks' AP automation delivered on reducing both labour and data entry errors for a consolidated AP system for Home Point Financial.

A clear view of accounts payable any time in real-time and saving time for invoice processing are the favourite features for Sarah Rehbein, AP Manager of Home Point Financial: "I can see who on the team needs help because they were off or sick, or which vendor to follow up on outstanding invoices. I no longer wonder what is missing in the email or did something get deleted. I'm able to have confidence on AP statuses, easily send out follow up emails to approvers and we save about between three and five minutes per invoice in processing."

Industry
Financial Services

Company Size
Over 1000 employees

Accounting Software
Sage Intacct

Copywriter for Symcor: Fintech Security for Financial Services – 2017

- Thought-leadership research and writing for blog articles for fintech security.
- Provided employee and corporate social responsibility stories on intranet.
- Interviewed and edited employee LinkedIn testimonials.

A Day in a Life of an Account Takeover Thief

Mitigating Account Takeover Fraud Losses

Account takeover (ATO) fraud detection is difficult for both financial institutions (FIs) and their customers. Often detection occurs after an adverse event when it's too late, such as when a maxed-out credit card or an emptied bank account occurs.

During an ATO fraud, account transaction patterns deviate from the norm. When signals are triggered during a data breach, FIs from banks to credit card companies, need to be alerted in real-time to immediately investigate and mitigate fraud losses.

This article exposes common ATO scenarios both offline and online, where criminals are selling real customer IDs in the deep and dark web, and the need for a robust and networked fraud alert solution across Canadian FIs to mitigate fraud losses.

Increasing Fraud Losses for Canadian Financial Institutions

The total number of victims from identity fraud in Canada was 20,611 in 2014, an increase from 17,094 in 2012 and 19,489 in 2013.[8] Criminals use stolen or reproduced information to:

- Access bank accounts, open new bank accounts and transfer bank balances
- Apply for loans, credit cards and other goods and services to make purchases
- Hide funds and avoid paying taxes through stolen or fraudulent identity

As total numbers of identity fraud rise for account takeovers, this results in greater losses for financial institutions, from banks to credit card companies:

- Account takeover fraud loss to Canadian financial institutions in 2015, increase of 75% since 2008.[9]
- Credit and debit card fraud results in Canadian banks reimbursing customers for approximately $500M.[10]
- The switch to EMV chip technology to process credit cards with embedded smart chips will cause fraud to increase up to $10 billion in fraud between now and 2020.[11]

Why Account Takeovers Are Rising in Canada?

ATOs occur where fraudsters use parts of the victim's identity such as usernames, passwords, email and snail mail addresses, bank account information, social security numbers and more to gain access to all types of financial accounts (from banking to credit cards). The reason is financially-motivated: one compromised account is worth up to $3 each on the underground market – more than 17 times the price of a stolen credit card number, which is only 22 cents.[1]

Account takeovers target accounts created by real users and the numbers are rising:

- The Canadian Anti-Fraud Centre saw a seven-and-a-half-fold increase in mail-forwarding fraud complaints: 479 complaints in 2016, compared to 63 in 2015. [2]
- Complaints of mail-forwarding fraud in 2016 were more than seven times higher than the previous year with Canada Post. [2]
- Between May and July 2015, 57 percent of the 500 million account creations analyzed were high risk or fraudulent – up from 28 percent in February, March and April 2015. [3]

Identity criminals use a range of non-technological to technological schemes for account takeovers. Both types with examples reveal a day in a life of an account takeover thief. [4]

How Non-Technology Account Takeovers Occur

Dumpster Diving: occurs when thieves go through garbage to obtain personal identifiable information from credit card bills, utility bills, medical insurance and bank statements.

Shoulder Surfing: occurs anytime you use a password or a device that stores PIN numbers, such as at an ATM. The identity thief gets close to see you enter your PIN number and records the password. This occurs in plain sight or through a video camera setup by the criminal.

Personal Theft: Identity thieves get your personal info by stealing your wallet or purse. This occurs in both public and private spaces.

Social Engineering: is the fraudster impersonating over the telephone, or computer, uses means to deceive someone else into divulging sensitive information.

Mail Break-in Thefts: occurs when thieves target your mailbox and removes mail with pertinent information on it. A thief can take your credit card bills and bank statements – to be used to steal your identity.

Mail Rerouting: Identity theft criminals have been known to re-route your mail without your knowledge or permission by submitting a change of address to Canada Post for ID theft either to a residence or a business address:

- After a mail rerouting notice, Hamilton received a letter from the Bank of Montreal, thanking her for applying for a Mastercard. A female criminal had shown up at a Canada Post branch with a driver's licence in her name and requested the address change. This was due to a third party opening up her letter to cancel her driver's licence.[5]

- Jay Bigam checked his Canada Post mailbox to find to his surprise a notification he had forwarded his mail to another address. Bigam was also the target of two tax return frauds, and a few fraudulent credit card applications in the past decade. He now pays for a credit monitoring service to alert him whenever his identity is being used.[5]

How Technology Account Takeovers Happen

Skimming: The recording device reading your credit card information from the magnetic strip on the back of the card records the card's code numbers onto another electronic storage device to make a copy of your card.

Pretexting: A thief has done prior research on your personal information, calls you on the phone, and leads you to believe they are a business requiring your personal ID.

Man-in-the-Middle Attack: This theft involves criminally intercepting communication between two parties and recording the information without the parties' knowledge to steal user identities.

Phishing Schemes: This occurs through cell phone messages, social networks, emails, text messages and snail mail. The following are the common phishing schemes.

Technology-based Phishing Cases to Watch

Pharming: A hacker tampers with a website host file or domain name system so that URL address requests are rerouted to a fake or spoofed website to capture personal identifying information to commit identity theft. The victim thinks they are on a trusted website, and enters personal information: credit card numbers, social security numbers and addresses.

Vishing: Voice phishing occurs when the thief contacts you over the telephone. The schemer impersonates legitimate organizations such as a government agency, a financial institution or a payment services organization to get you to disclose your personal identification.

Search Engine Phishing: Thieves create websites with "too good to be true" offers, products, and incentives that are found searching for these on search engines. The visitor is persuaded to give up his or her personal identifying information to take advantage of the offer.

Smishing: The identity thief sends spam text messages posing as a financial institution or other legitimate entity. The text message tricks you to believe there is a serious emergency that will cause you to suffer financial losses or fees if there is no response. This leads you to disclose personal identifying information by clicking on the link on the text message.

Malware Phishing: The thief attaches a harmful computer program called malware made to look helpful onto emails, websites, and other electronic documents on the Internet. The malware uses key loggers and screen loggers to record your keyboard strokes and sites you visit on the Internet, which are sent to the hacker at another location on the Internet.

Phishing Spam: The spammer sends multiple spam emails to you with opportunities for scholarships, business partnerships, or free products. In some instances, the spammer pretends to be a financial institution to trick you to provide your personal identifying information.

Spear Phishing: Spear phishers send emails to almost every employee of an organization to look like it is from the IT or HR department. For instance, the email states every employee must send their user name and password for verification purposes, giving the attacker access to your personal ID and company private information.

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Where to Find Real Customer IDs on the Dark and Deep Web

Once criminals steal customer IDs, they can sell them on the dark web marketplace found on Reddit and Instagram. The Fake IDs subreddit is a community within Reddit where people can share links, accounts of their experience and information about the purchase and creation of illegal fake IDs, while Instagram hashtag #fakeID enables users to locate fake ID vendors.[6]

There is also the deep web, a collection of websites and servers inaccessible through normal web browsers. Instead, they are accessed using "Onion" links, a series of letters and numbers that form a URL that will only load through the anonymous web browser Tor at https://torproject.org/.[7]

Symcor's COR.IQ Fraud Alert Solution

With ATOs on the rise in Canada and fraud losses impacting both FIs and consumers, fraud alert solutions to spot unusual patterns fast are the key to combat criminals. During an ATO, financial institutions need real-time alerts to immediately investigate and mitigate fraud losses.

That's where Symcor's COR.IQ can help by sharing instant ATO data breach signals. To achieve this, the COR.IQ Platform networks data, people, and companies, by extending a single customer view to the most complete view of a customer's financial behaviour across all FIs.

Oftentimes, when a customer's credit card is compromised, other credit cards and bank accounts could be at risk. The COR.IQ fraud alert solution keeps customers safe, while helping financial institutions reduce their overall fraud losses.

Learn more about Symcor's COR.IQ platform to mitigate ATO fraud losses at Symcor's LinkedIn Page or contact us at https://www.symcor.com/en/contact-us.

Sources:

1 http://www.darkreading.com/endpoint/anatomy-of-an-account-takeover-attack/a/d-id/1324409
2 http://www.cbc.ca/news/canada/edmonton/edmonton-fraud-canada-post-mail-forwarding-1.3922063
3 http://www.csoonline.com/article/2975333/cyber-attacks-espionage/fraud-rate-doubles-as-cybercriminals-create-new-accounts-in-users-name.html
4 http://www.utica.edu/academic/institutes/cimip/idcrimes/schemes.cfm
5 http://www.cbc.ca/news/canada/montreal/canada-post-mail-forwarding-fraud-1.4075968
6 http://www.businessinsider.com/reddit-and-instagram-have-a-marketplace-for-fake-ids-2014-10
7 https://www.reddit.com/r/deepweb/comments/3gifi3/fake_id_guides_on_the_deep_web/
8 http://www.cbc.ca/news/canada/edmonton/edmonton-fraud-canada-post-mail-forwarding-1.3922063
9 http://www.antifraudcentre-centreantifraude.ca/reports-rapports/2014/ann-ann-eng.htm
10 Symcor CORE.IQ Platform Deck Generic Presentation
11 http://www.cnbc.com/2016/05/06/those-new-chip-cards-will-cause-14-billion-in-fraud-by-2020.html

Industry
Fintech

Company Size
Over 1000 employees

Fintech Software
Symcor

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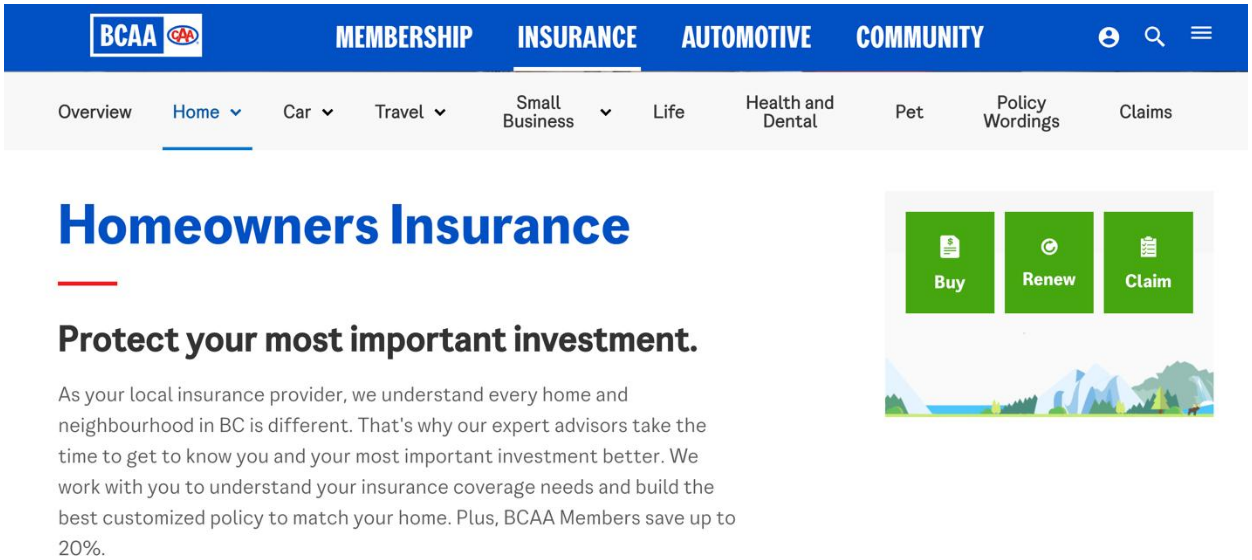
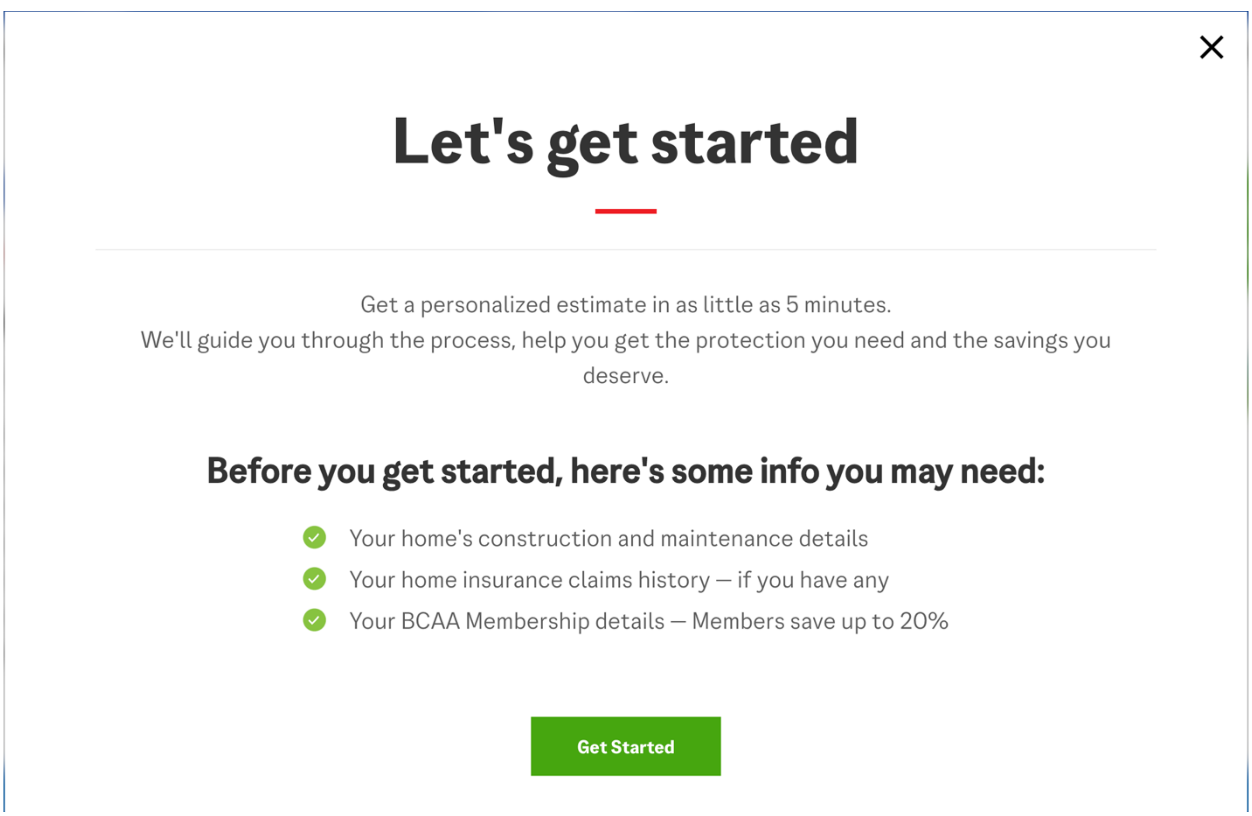
UX Writer for BCAA: Home Insurance Quote Landing Page – 2018

I provided UX writing for BCAA Home Insurance collaborating with product, IT, and legal teams in 2018.





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Copywriter for BCAA: MBNA Mastercard Credit Card – 2001

I worked for BCAA as a full-time copywriter for 12 months, which included the MBNA Mastercard for members.

CAA Dollars - BCAA Member Rewards

- Earn Unlimited CAA Dollars[1] on purchases made with the CAA MasterCard® credit card[2] from MBNA Canada Bank®.
- Use your BCAA Membership card on valid purchases made at Husky & Mohawk.[3]

What CAA Dollars can do for you.

- All CAA Dollars are credited to your BCAA Membership account.
- You can use CAA Dollars towards your next BCAA Membership renewal.
- Or use them to purchase select travel, insurance and merchandise products from BCAA.

Earn CAA Dollars with your CAA MasterCard and enjoy other benefits

- Earn a 1% rebate as CAA Dollars on net retail purchases.
- Earn a 2% rebate on eligible purchases at Husky & Mohawk.
- Plus these great benefits and more...
    - No Annual Fee
    - 24-hour Customer service
    - Credit limit up to $100,000
    - Around the clock fraud protection
    - MasterRental® collision coverage‡
    - Credit card payments at most major banks
    - MasterPurchase® to protect the things you buy with your CAA MasterCard‡

Worldwide acceptance at millions of locations

[1]CAA Dollars terms and conditions available upon request, or go online at www.bcaa.com
[2]Complete details available on separate brochure. MasterCard® is a registered trademark of MasterCard International Incorporated, used pursuant to license. MBN are registered trademarks of MBNA America Bank, NA, used pursuant to license by MBNA Canada Bank.
[3]Lottery tickets and tobacco products are exempt.

Industry
Road Safety Membership

Company Size
Over 500 employees

Membership Services
MBNA Mastercard

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Copywriter for BCAA: MBNA Mastercard Credit Card – 2001

I worked for BCAA as a full-time copywriter for 12 months, which included the MBNA Mastercard for members.

Industry
Road Safety Membership

Company Size
Over 500 employees

Membership Services
MBNA Mastercard

Copywriter for Data Driven Marketing: Financial Services Email – 2020

I worked for Data Driven Marketing as a full-time copywriter for 3 months, which included email.

Enriched Academy Email Series: Registration (NEW)

We are so excited for you to attend the LIVE Enriched Academy "Financial

[EMAIL 1]

Re: Your Financial Certainty MasterClass

Hi Harrison,

Welcome in!

Excited to have you in our next Financial Certainty Masterclass.

Here's the webinar information:

When: Thursday June 4th, 2020 at 1:00 PM EST

Link: [xxxxx]

In the workshop, our VP, Arian Beyzaei, is going to share with you how to overcome some of the most common financial obstacles for Canadians, including:

- How to get out of debt and escape the trap of living paycheque to paycheque once and for all.
- How to create a financial plan and work towards financial and time freedom.
- How to clone proven money management strategies and learn where, what and how to invest.

We also prepared a short clip for you.

It's when my business partner Jay and I went on the Dragon's Den 7 years ago...And we signed a deal with Jim Treliving and Bruce Croxon! Shortly after that deal, we expanded to the market for adults.

But it's just crazy to see how far we've come!

Anyway, it's the first video on this page.
https://www.youtube.com/playlist?list=PLk4lEONBJ-h_ymWjhfLofGV3Eb79Z1p8H

On the page you can also find other short videos we've put together for you.

All designed to help you get the most out of your masterclass.

Excited for the journey ahead, and I'm so glad you're here with us.

Talk soon!

- Kevin Cochran
Co-Founder, Enriched Academy
Canada's #1 Financial Literacy Program. Trusted by over 100,000 Canadians!

[EMAIL 2]

46% of financial planners don't have a financial plan?

Quick reminder that your LIVE Financial Certainty Masterclass is 2 days away!

Hey Harrison,

Shocking, right?

46% of financial planners don't have a financial plan.
https://www.financial-planning.com/news/46-of-planners-have-no-retirement-plan-fpa-finds

What kind of hypocrisy is that?

See...

I'm not saying financial planners or financial advisors are bad. There are a lot of good ones with proven track records.

But the problem is...

Most people don't know how to tell the bad ones from the good ones. And end up wasting money working with the bad ones.

And that's exactly what we are trying to change...

To help you improve your financial literacy...

So you are more confident in yourself. In your financial choices.

And in your financial future.

The staggering fact I mentioned at the beginning of this email was part of the video:

"Are financial advisors bad?"
https://www.youtube.com/playlist?list=PLk4IEONBJ-h_ymWjhfLofGV3Eb79Z1p8H

It’s pretty entertaining too…

So I'm sure you’ll get a good laugh out of it.

By the way...

On that page you'll also find a collection of videos we put together just for you. They'll help you get the most out of your webinar coming up in 2 days.
Again, so glad you're here with us.

Talk soon,

- Kevin Cochran
Co-Founder, Enriched Academy
Canada’s #1 Financial Literacy Program. Trusted by over 100,000 Canadians!

Liza J. Lee | 604.728.8834 | Vancouver, Canada | LizaJLee.com@gmail.com | LizaJLee.com | LinkedIn/in/lizajlee

DATA DRIVEN MARKETING

Copywriter for Data Driven Marketing: Financial Services Facebook Ads – 2020

I worked for Data Driven Marketing as a full-time copywriter for 3 months, which included Facebook ads.

VIDEO 1: https://youtu.be/jkYQQuksNOE (Katie Whitermt 63 seconds) (White Collar Female)

FACEBOOK AD 1 (NO DATE AND NO TIME)

PRIMARY TEXT:
⭐⭐⭐⭐⭐ Here's how one Enriched Academy student took control to become **WEALTHY AS A CANADIAN**: "I discovered the tools to get rid of debt, save for retirement, figure out net worth and no longer feel embarrassed about finances." (Katie Whitermt)

We are the LEADING FINANCIAL EDUCATION company in Canada and one of the top deals on the hit show DRAGONS' DEN! 💥💥 Trusted by over 100,000 Canadians!

✔️ Sign up for FREE LIVE MasterClass. Seats are extremely limited!

HEADLINE: Enriched Academy Student [Testimonial]
Description: Katie Whitermt 63 seconds
IMAGE/Video TEXT: Enriched Academy Student [Testimonial]

FACEBOOK AD 2 (NO DATE AND NO TIME)

PRIMARY TEXT:
✔️ Learn how Enriched Academy student took control with Canada's #1 Financial Literacy Program to **BECOME WEALTHY**: "I discovered the tools to get rid of debt, save for retirement, figure out net worth and no longer feel embarrassed about finances." (Katie Whitermt)
✔️ We are one of the top deals on the hit show DRAGONS' DEN! Trusted by over 100,000 Canadians!

✔️ Sign up for FREE LIVE MasterClass. Seats are extremely limited!

HEADLINE: Enriched Academy [Testimonial]
Description: Katie Whitermt 63 seconds
IMAGE/Video TEXT: Enriched Academy [Testimonial]

FACEBOOK AD 3 (NO DATE AND NO TIME)

PRIMARY TEXT:
🛑 ATTN! Learn how to **become wealthy** like Enriched Academy student, Katie Whitemt: "I discovered the tools to get rid of debt, save for retirement, figure out net worth and no longer feel embarrassed about finances."

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