

# MARKET VOLATILITY

## EMAIL TEMPLATES

### EMAIL ONE | MARKET AWARENESS

#### SUBJECT: MARKETS ARE MOVING. WHAT SHOULD YOU DO?

Recent market movement has created a lot of questions for investors.

Volatility can feel uncomfortable, especially when headlines and daily swings begin to draw more attention. At the same time, market fluctuations are a normal part of the investing experience.

One important consideration is how your current plan is positioned to respond to changing market conditions.

If you have not reviewed your strategy recently, this may be a good time to take a closer look.

You can start with a quick volatility readiness check here: [\[Quiz or Checklist Link\]](#)

### EMAIL TWO | EMOTIONAL DECISIONS

#### SUBJECT: THE COST OF REACTING AT THE WRONG TIME

One potential risk during periods of market volatility is not always the market itself. It is how investors respond to it.

Making decisions based on short-term movement can lead to outcomes that do not align with long-term goals.

A well-structured plan is designed to help guide decisions during periods like this, so that changes are made intentionally rather than reactively.

If you are unsure how your current strategy is positioned, a simple first step is to evaluate your preparedness.

Take the volatility readiness quiz here: [\[Quiz or Checklist Link\]](#)



# MARKET VOLATILITY

## EMAIL TEMPLATES

### EMAIL THREE | RISK ALIGNMENT

#### **SUBJECT: WOULD YOU BUILD YOUR PORTFOLIO THE SAME WAY TODAY?**

Here is a question worth considering.

If you were starting today, would you structure your portfolio the same way?

Over time, portfolios can shift as markets move. What may have started as a balanced strategy can gradually take on more exposure without a deliberate decision being made.

Periods of volatility often bring this into focus.

If it has been a while since you reviewed your positioning, now may be a good time to revisit it.

You can begin with a short assessment here: [\[Quiz or Checklist Link\]](#)

### EMAIL FOUR | INCOME PLANNING

#### **SUBJECT: HOW INCOME STRATEGY IMPACTS MARKET VOLATILITY**

For many investors, especially those approaching or in retirement, market volatility raises an important question.

Where will income come from during down markets?

Having a clear income strategy can help reduce reliance on market timing and can play a role in managing income needs during periods of uncertainty.

If this has not been clearly defined, it may be worth revisiting.

You can start by evaluating your current plan here: [\[Quiz or Checklist Link\]](#)



# MARKET VOLATILITY

## EMAIL TEMPLATES

### EMAIL FIVE | HIDDEN RISK

#### **SUBJECT: WHAT STRONG MARKETS MAY BE HIDING**

Strong markets can create a sense of confidence.

At the same time, they can also lead to changes in portfolio exposure that are not always obvious.

This is often referred to as risk drift. As markets rise, portfolios can become more aggressive without a clear decision being made.

Many investors do not identify this until conditions change.

If you have not reviewed your allocation recently, this may be a good time to take a closer look.

Start with a quick check here: [\[Quiz or Checklist Link\]](#)

### EMAIL SIX | CALL TO ACTION

#### **SUBJECT: IS YOUR STRATEGY POSITIONED FOR MARKET VOLATILITY?**

Market volatility will continue to be part of the investing experience.

The key question is whether your plan is prepared to handle it.

Taking time to review your strategy now can help create more clarity and confidence, regardless of what the market does next.

If you would like to better understand how your current plan may respond, you can start here: [\[Quiz or Checklist Link\]](#)

### ADVISOR NOTES | INTERNAL

- Send emails as a sequence or use individually based on timing
- Pair each email with a relevant article or video when possible
- Keep messaging consistent with conversations and other campaign materials
- All emails should direct to the quiz as the primary call to action

