

The Banking and Investing Program | Marketing Communication Guidelines

OUR ASK TO YOU

Your Employee Banking & Investing Relationship Manager (RM) will deliver off-the-shelf marketing assets ready for you to deploy in your internal communication channels. **We ask you to keep these factors in mind to ensure legal marketing compliance:**



No marketing assets may be created or changed without prior approval by Bank of America.

Do not create or make changes to Bank of America approved marketing assets. Your RM will work with you to ensure your marketing assets adhere to Bank of America’s stringent regulations as a financial institution.



Adhere to “Remove By” Date

Your RM will work with you to keep marketing refreshed throughout the year. Please replace as your RM instructs or by the remove by date listed on marketing asset(s).

KEY STEPS TO MARKETING SUCCESS:

1. Plan with Your RM

- Together with your RM, **select marketing assets** for your program from Bank of America **approved templates**
- Review to ensure selected marketing assets **meet your organization’s communication and technology requirements** and the **intended platform can properly display all graphics, disclosures and file format types**
- Provide anticipated date(s) when selected marketing assets **will be distributed/published** to your employee audience

2. Receive Bank of America Approved Marketing Asset(s)

- Bank of America approved marketing assets and marketing communication guidelines will be **provided by your RM**
- Once received, **marketing assets may not be changed without prior approval** by Bank of America
- Any additional changes requested **will require additional review** from Bank of America’s internal team and **may increase approval turnaround time**

3. Publish Marketing Asset(s)

- Distribute/publish/post marketing assets to your employee audience **exactly as provided** and by the agreed upon date
- If the marketing assets will not be used, **notify your RM and discard the asset**

4. Remove Marketing Asset & Replace

- Marketing assets are **not valid after the remove by date** listed on the asset
- Work with your RM to **select new marketing assets** for distribution/publication for the most **up-to-date program information**
- Your RM may request confirmation **that the marketing asset was used as intended and/or removed** – please provide the requested confirmation

