

# Marketing Plan: Financial Education First Campaign

## Goal

To introduce your business as a **trusted source of financial and credit education**, creating awareness and engagement with your audience while building credibility.

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## 1. Sample Social Media Post Caption

**“Your credit report shouldn’t be a mystery. Learning how to understand and manage it is the first step toward financial confidence. I’m offering financial education sessions where we walk through key credit basics, common errors, and how the credit system works. Knowledge is power — send me a message if you’d like to learn more about getting started.”**

### Compliance Notes:

- Avoid “repair,” “fix,” or “delete.”
  - Focus on “understand,” “learn,” “educate,” “manage,” “navigate.”
  - Call-to-action is **education-centered**, not promise-based.
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## 2. Canva Templates (For Social Media Posts)

Click this link for your free social media posts template. You can use the content below as a guide when you start creating your own social media posts.

[CLICK HERE TO ACCESS THE TEMPLATES](#)

### *Post 1 – Understanding Credit Reports*

#### Headline:

 “Know What’s On Your Credit Report”

**Body Tip:**

Your credit report lists your payment history, accounts, and inquiries. Mistakes can happen — and knowing how to read it is the first step to protecting your financial health.

**Closing Line/CTA:**

“Always review your credit report from all three bureaus regularly. Follow us for more tips”

***Post 2 – Payment History Matters*****Headline:**

 “On-Time Payments Are Powerful”

**Body Tip:**

Payment history makes up **35% of your credit score**. Even one late payment can affect you. Setting up automatic reminders can help you stay consistent.

**Closing Line/CTA:**

“Paying on time is one of the simplest ways to build stronger credit.”

***Post 3 – Keep Balances Low*****Headline:**

 “Manage Your Credit Utilization”

**Body Tip:**

Using less than **30% of your available credit** is a smart strategy. For example, if your card limit is \$1,000, try to keep your balance under \$300.

**Closing Line/CTA:**

“Lower balances = healthier credit. Visit [www.yourwebsite.com](http://www.yourwebsite.com) to learn more.

## Post 4 – Know Your Rights

### Headline:

 “You Have Rights Under the Law”

### Body Tip:

The **Fair Credit Reporting Act (FCRA)** gives you the right to dispute inaccurate information on your credit report. If something looks wrong, you don’t have to accept it.

### Closing Line/CTA:

“Knowledge of your rights is key to financial empowerment.”

## Post 5 – Building Over Time

### Headline:

 “Credit Building is a Journey”

### Body Tip:

Strong credit isn’t built overnight. It takes consistent habits: paying on time, managing balances, and reviewing reports. Over time, these steps add up.

### Closing Line/CTA:

“Think long-term — your credit is part of your financial future.”

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## 3. Basic Email Template

### Subject Line:

“Ready to Understand Your Credit?”


### Body Copy:

Hi [First Name],

Understanding your credit report is one of the most powerful steps you can take for your financial future. That’s why I’m offering **financial education sessions** designed to help you:

- Learn how credit reports work
- Understand common reporting issues
- Explore steps you can take to manage your credit with confidence

These sessions are all about **education, empowerment, and clarity** — so you can make informed decisions about your financial future.

 [\[Click here to learn more about financial education sessions\]](#)

Best,  
[Your Name]

## Quick Action Steps

1. Post the social media caption and content across platforms 2–3x weekly.
2. Share/distribute the **flyer** locally and digitally.
3. Send the **email template** to your warm list or leads that you have on your list.
4. Focus on **financial education sessions** and content.
5. Use the different marketing tips provided as your **trust-building entry point** before offering any deeper services.