



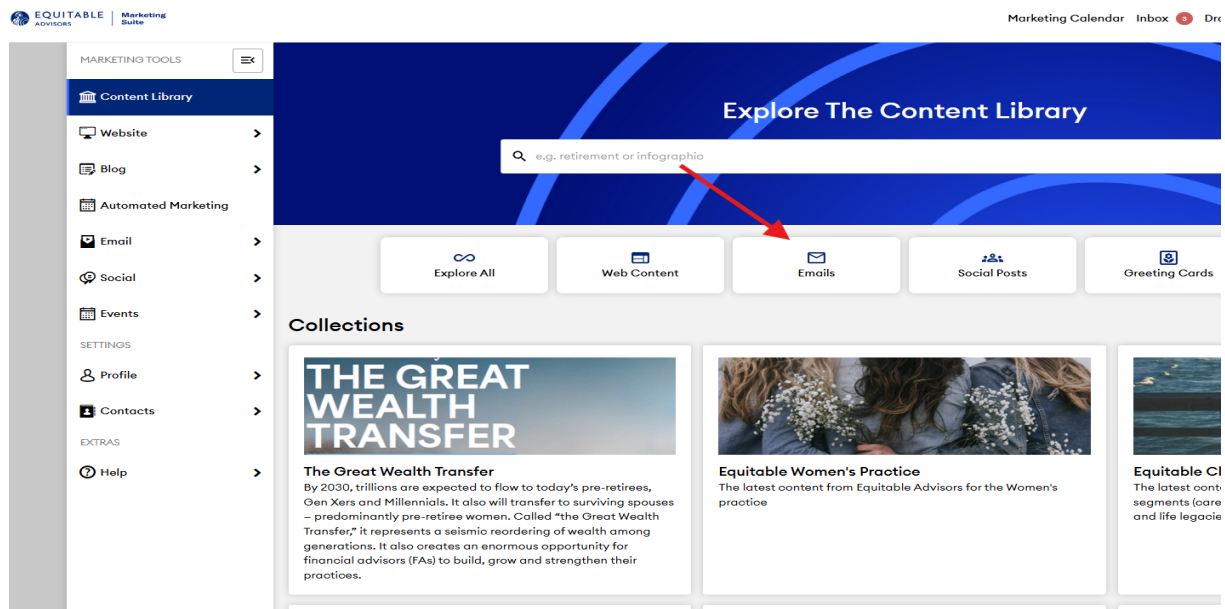
Email Tokens - QRC

GENERAL OVERVIEW:

Introducing our latest enhancement to the email marketing functionality within the Marketing Suite platform, specifically tailored for Advisors utilizing modifiable content ("MUST MODIFY"). This new feature significantly boosts efficiency by allowing Advisors to bypass the Compliance review process for pre-approved content when making adjustments to preset variable fields. By streamlining the approval workflow, Advisors can now focus on personalizing their communications swiftly and effectively, without the need for lengthy Compliance reviews. This enhancement ensures that advisors maintain compliance while enjoying the flexibility to customize their messages, ultimately leading to more timely and relevant client and prospect interactions.

Below are steps to get started:

1. In Marketing Suite, navigate to Email Library and find the pre-approved email you intend on sending.





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2. Click Use on the far right of the email you wish to send (Note: click the title of the email if you want to preview the content)

MARKETING TOOLS

- Content Library
- Website
- Blog
- Automated Marketing
- Email
- Social
- Events

SETTINGS

Marketing Calendar | Inbox 3 | Drafts 23 | Compliance 14

Back to Content Library

Results

e.g. retirement or infographic

All (1295)	Web Content (418)	Emails (376)	Social Posts (64)	Greeting Cards (276)	Downloadables
On	Title	Type	Author	Actions	
☐	New 403(b)/457 clients: School/workplace visit	Email	Equitable Sandbox	Details Use Save As Template	
☐	New April 7, 2025 Weekly Market Insights	Email	FMG	Details Use Save As Template	

3. Click Schedule Email As Is and fill out corresponding fields.

Cancel

You'll be asked to replace the placeholder tokens in this email before it can be scheduled.

[Preview Email](#) [Check For Compliance](#)

Replace Email Tokens

There are placeholder tokens in this email that need to be replaced before your email can be scheduled.

[Preview Email](#) [Send Test Email](#)

1 Email Tokens 2 Choose Audience 3 Choose Send Date 4 Confirm

School or Company Name 11 / 200

Retirement Plan (403 or 457) 20 / 200

Event Date

Start Time

End Time

Meeting Location 16 / 200

Additional Information or Virtual Meeting Information 23 / 500

[Never Mind](#) [Back](#) [Next](#)

4. Once you have filled out all token fields, click Preview Email (we encourage you to use the Send Test Email feature to ensure accuracy and deliverability). Provided all information is displayed correctly, click Next.



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5. Select your audience, then click Next. Choose your send date, then click Next.

6. On the Confirm Your Details screen, we suggest you use the Preview link for a final review of the content with inputted token fields. Finally, click the Send Email button and you're all set and your email will be sent at the day and time you selected!

Please note, from this screen you also have the option to save this email as a template for future use. (NOTE: this selection saves the email **WITH** the inputted token values. To save the email without inputted values, please see optional Step 7 below).



EQUITABLE
ADVISORS

Marketing
Suite

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To save a pre-approved email as a template for future use (WITH open token fields):

7. Click Emails > find the pre-approved email you want to save > Save as template

Marketing Calendar | Inbox 3 | Drafts 23 | Compliance 14

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SETTINGS

← Back to Content Library

Results

Search e.g. retirement or infographic

All (1295) Web Content (418) Emails (376) Social Posts (64) Greeting Cards (276) Downloadables (1)

On	Title	Type	Author	Actions
☐	New 403(b)/457 clients: School/workplace visit	Email	Equitable Sandbox	Details Use Save As Template
☐	New April 7, 2025 Weekly Market Insights	Email	FMG	Details Use Save As Template

You also have the ability to create a custom template using tokens. This will prevent a Compliance review each time an email template is used, if the content of the email is not changed. (Note: if any content of the email is changed outside of the token values, it will route for Compliance review)

1. Click Email > Your Email Templates

Marketing Calendar | Inbox 3 | Drafts 23 | Compliance 14

MARKETING TOOLS

- Content Library
- Website
- Blog
- Automated Marketing
- Email
- Send Email
- Your Email Templates
- Sent & Scheduled
- Edit Email Design
- Social
- Events

SETTINGS

Explore The Content Library

Search e.g. retirement or infographic

Explore All Web Content Emails Social Posts Greeting Cards Downloadables

Collections

The Great Wealth Transfer
By 2030, trillions are expected to flow to today's pre-retirees, Gen Xers and Millennials. It also will transfer to surviving spouses

Equitable Women's Practice
The latest content for each of Equitable Advisors' practice

Equitable Client Segments
The latest content for each of Equitable Advisors' segments (career starters, builders, pre-retirees)

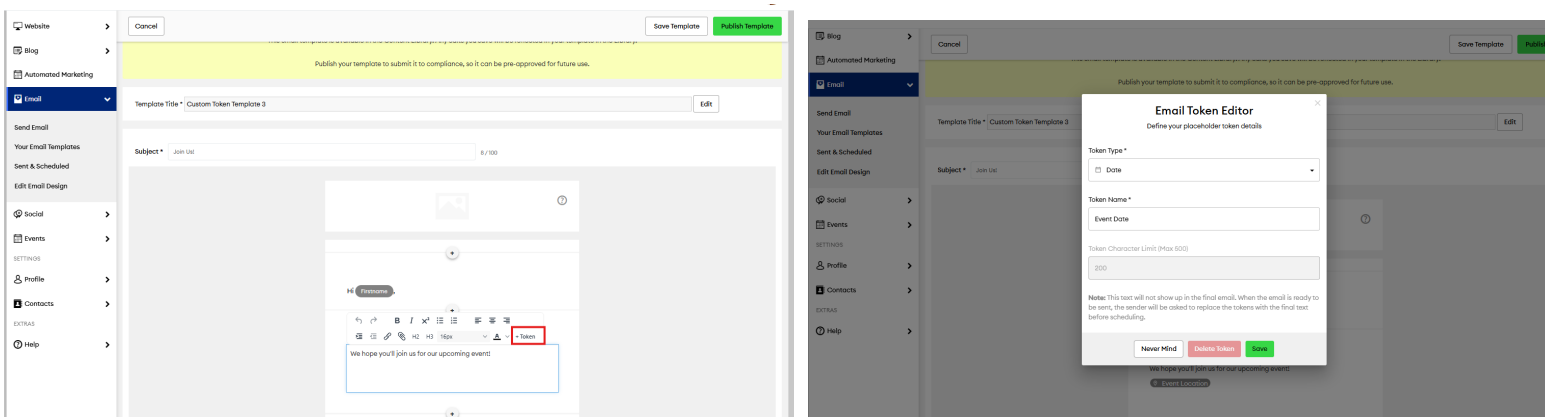
For Internal Use Only



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2. Click Create A Template > Add a Template Title > Save

Once the email template is created, you'll want to update the Subject Line and begin creating the email using the email builder functionality. Use the +Token feature to add sections where there would be variable text (see example below).



3. Be sure to review your email before publishing by clicking the Preview Email button on the top left.

4. Once final, click Publish Template. This will trigger Compliance review. The status of the email will show In Review until it's approved for use, at which time the status will change to Pre-Approved.

