

This is a full project for a financial program that helps parents teach their children about money. It includes a welcome email, an upsell email, an FAQ for the website, and a call script for customer service.

Subject: Welcome to the Budget Brainiacs Community!

Preview Text: Your login access and easy steps to teach your kids smart money skills.

Welcome [name].

We're so glad you joined our community of parents and children who budget their money wisely. Thank you for trusting us to teach your children these *essential* life skills. Your purchase is backed by our iron-clad 30-day 100% money back guarantee.

Getting started is easy! We've gathered the resources you'll need right [here](#).

Your **Budget Brainiacs** membership has benefits for children of all ages...and that includes parents and grandparents too! It's quality family time with your children as they learn smart money skills by playing fun games. You're making memories filled with valuable lessons that will last a lifetime, and someday they will thank you for them.

Here's some of the skills your kids will develop:

Your **littles** learn how to recognize the different money denominations and the basics of how to use them as currency. They earn reward points they can turn in for great prizes. These prizes get more valuable as they continue to learn more skills, making them eager to play every day.

Your **tweens** learn how to open a checking and savings account. They gain valuable experience on how interest works and how to choose the bank offering the most benefits for their money.

As they complete these tasks and level up, they earn reward points they can cash in at our online Clubhouse store for great prizes related to managing their young life like a super-cool backpack or personalized wallets.

Your **teenagers** can practice applying for jobs and looking for the best benefits like 401k and HSA accounts. When they learn the value of free money like having a 401k, they earn extra reward points which opens a limited prize Clubhouse room for unique items like online gift cards redeemable at stores like Best Buy.

As an incentive for developing a habit of playing daily, they earn bonus points. When your **tweens** and **teenagers** check in daily, they will earn different bonuses like cashing in their reward points at 1.5 times their value or limited prizes for items like a Visa gift card. With the Visa gift card they'll learn how to track their spending with a monthly statement.

Parents who sign up for our monthly newsletter are always aware of current updates and upcoming events. This is where you'll learn about upcoming challenges and prizes so you can plan to attend what activities your kids will enjoy the most.

You have access to reports where you will see the skills your child has developed, and any areas they may need your help to improve. Parental settings **you** control are available where you can pick what type of experience your child will have, as well as what you deem appropriate for their age.

Parents earn reward points by staying engaged with their child's progress and working with them to improve their skill development. Those reward points are redeemable at the online Clubhouse store for great prizes like a spa gift card.

If you have any questions you can always check out our FAQs [here](#) or by email just click [here](#). Our customer service team can be reached by calling 1-800-555-9999 Monday-Friday 9am-6pm EST.

Again, welcome! We're confident your children will learn these valuable skills so keep us informed by connecting with us via social media (click icon below).

Sincerely,

Sandy Franks
Membership Director



P.S. *Don't miss your welcome offer for 10% off your first purchase in the online Clubhouse. Use code **WELCOME10**.*

FAQs for parents

Find the answers you need here to help your kids gain a positive relationship with money so they can be successful in adulthood.

We've gathered the top questions asked by parents, so you'll have the tools you need when introducing your kids to Budget Brainiacs.

You'll want to check back here often because we're always adding new features and games to our program. Checking here keeps you up to date on the latest news and features.

General Questions

How do I change my password?

At the login page select 'Forgot my Password' below the password box and a new window will open. Answer your security questions and create a new password. For your protection, you'll be logged out and asked to login again with the new password.

How do I change my email?

Once logged in on the home page, click the upper right corner where it says **Settings** and select 'Change Email.' For your protection, you'll be logged out and asked to login again with the new password.

How do I contact customer service?

Our customer service team is available from 9am-6pm EST, Monday through Friday. They're a dedicated team providing you with 5-star service. You can reach them at 1-800-555-9999.

How do I sign up for your email?

There are two free e-newsletters, one that is sent out every Friday so your kids will always have the current week's activity schedule. On the 1st of every month, we send a monthly e-newsletter to parents keeping you informed of any new features or games that have been added to the program. You can elect to have one or both emails sent to you at any time under the **Settings** tab in the upper right corner and select 'Notifications.'

What is your return policy?

We offer a 30-day 100% money back guarantee. You may cancel at any time before the end of the 30-day trial and you won't be charged a penny. If you decide that you want to cancel you can do so by calling 1-800-555-9999 Monday- Friday 9am-6pm EST.

Can I make changes to my order?

At any time you can upgrade or downgrade your membership by clicking the **Settings** tab in the upper right corner and select '**My Plan.**' If there is any cost difference, we will prorate the charges and you will be charged for the partial month at the new rate. If there is a refund due it will be credited to your account and discounted from the charge for the following month(s) until depleted.

Are there reports available to track my children's progress?

You can view reports at any time under **Settings** in the upper right corner and by selecting '**Reports.**' These can be a valuable tool to measure your children's growth and discuss their next steps as they get older.

Personal game page questions

How do I set up my child's game page?

Setting up your child's personal game page is an easy two-step process. Once you're logged in click the **Game Page** tab in the upper right corner. Your kids' game page will automatically be set up with parental controls keeping them safe inside the Club game page with a multilayered secure connection.

Once on the **Game Page** click '**New Page**' and type each kid's name and age for their individual pages to be set up. Once they create a username and password, they're already a member of the Club. They'll need to login to their device to play the games and earn points.

How do we redeem points for prizes?

From the **Game Page** click on '**Clubhouse Store**' in the upper right corner to begin shopping. You can browse by points or category for your convenience. A small shipping fee may be applied and can be charged to your account. It will be billed with your monthly payment.

How do I track my prize order from the Clubhouse Store?

Once you've made your selections and 'paid' with your points, you will receive an order confirmation number and an email. When the order has shipped, you'll receive a second email with your tracking number.

Can children play against each other in the games?

Some games do allow for friendly competitions so that siblings and/or friends can play each other. It does require parental permission. This is easily done by clicking **Settings** in the upper right corner and selecting '**Connect.**' If they're your kids, you select their names. If they are not under your account, enter the email address of the other Club parent and they need to do the same. Once completed, your kids can begin playing together.

Are there any special events my kids can participate in?

Yes! We have weekly contests that offer bonus points to the top three finalists in their age group. To find out about the current week's contest click on **What's Up** in the upper left corner for the latest news or you can sign up for our e-newsletters to plan for the next week.

We realize that at times kids can ask some great questions. If you don't see your question answered here, we invite you to click this link [here](#) so we can continue adding to this list. If you need an immediate answer, try our live chat by clicking on the blue bubble in the bottom right corner on any page including this one.

Subject: Invitation only access available for a limited time – grab your spot!

Preview Text: Behind the scenes access to dedicated events where your voice can be heard.

You're Invited to Join an Engaging Private Community With Outstanding Benefits for Your Family That You Can Use Right Now!

Welcome to the **Budget Brainiacs** community [Customer Name]!

A place for parents and their children to have *quality* family time while learning how to use money wisely and planning for their future.

Kids love it for the exciting games and wonderful prizes that they earn. Parents love it for the peace of mind they gain knowing their kids will make smart money choices in their lives. It's a way to create lasting memories that your children will reflect on in their everyday life when they're confronted with a money decision.

Parents have a cutting-edge opportunity to arm their children with the tools they need to help them secure their future. Our *VIP membership* provides a unique chance for parents to ensure their children experience the most by engaging in these life lessons.

With a *VIP membership*, you're invited to participate in our world-class **Quarterly VIP Webinars**.

Professional speakers attend these events demonstrating how to use the tools available in your membership to the full. Each quarter a specific lesson is targeted to demonstrate how to pick the right online bank, the best places to invest money, or teaching children the importance of saving money.

Your input and questions are why these sessions are such a success. There are opportunities for breakout discussions with other parents who may have a similar situation as yours, or whose suggestions you'd like to learn more about.

We welcome you to these webinars so you can network and get a fresh perspective. It is just one of the ways we enhance your membership benefits. Parents often come away more confident in how they can better assist their kids with areas that they struggle with.

Your *VIP membership* includes a **dedicated phone line** with our expert team of specialists available to assist you.

When you need something, just call the dedicated phone line and your team specialist will immediately know you are *VIP*. They can answer your questions and provide details for your premium membership.

Our dedicated team of professionals are available exclusively to our *VIP* members Monday-Friday 9 am to 5 pm EST. They are well educated with everything the *VIP membership* offers and have the experience to help you maximize your *VIP* benefits.

Because this team is dedicated to our premiere members they're prompt and able to offer solutions on the first call. Many of our *VIP* members take advantage of this benefit and have often told us that they feel this is one of the best benefits to being a *VIP* member.

VIP membership allows you to access our elite **Office Hours** events.

Every Monday at 2pm EST, our legendary *Membership Director*, **Sandy Franks** hosts our elite Office Hours events. This time is available for *VIP* members to share their stories and opinions about the product and services provided in the **Budget Brainiacs** package.

It is an exclusive opportunity for you to be heard. These sessions are very important to us because we use these discussions to continuously improve by incorporating our *VIP* members' suggestions and ideas. Come, let *your* voice be heard!

VIP members also benefit from **discounts** ranging from **10-25%** off items in our online Clubhouse. The savings are tremendous with *VIP*!

In fact, the savings you receive from your *VIP membership* discounts can quickly cover the cost of your upgrade to *VIP* making it virtually no cost to you.

Our *VIP* members automatically get **lifetime access** to any new programs or upgrades that we develop in the future at no additional cost. That means that any upgrades or technology integration that is added in the future is yours to experience free.

Budget Brainiacs is recommended by *Parents Magazine* and *Money* magazine for the essential money skills it teaches children. Some of the skills your children will learn to master are:

- Recognizing the value of money
- Knowing how banks make money and how interest rates work
- Applying for jobs, apartments, and loans
- Managing credit
- Opening savings and checking accounts
- Budgeting monthly bills and expenses
- Saving and planning for their future

Money skills are a valuable life lesson that your children will thank you for some day. You will have confidence that you have provided a vast amount of knowledge and experience that they can pass on to their children.

Here's what other *VIP* members say about the **Budget Brainiacs** program:

"Your program is fantastic...It's such a relief to know that my children will be well-prepared for managing their money when they embark on their own lives as adults." – T. Bazell

"...Based on the comments on my blog posts about Budget Brainiacs, you have a home run! My readers...(kids) talk about how dumb it is to rack up debt and how you should plan ahead for big expenses. These comments are coming from 13-year-olds! Wow!" – H. Walters

You can take advantage of every one of these exclusive benefits by upgrading your membership to *VIP* today!

VIP membership is a **one-time** charge of \$197, **but if you act right now**, you can join for only **\$97** dollars!

That's a very generous discount of over **50% off!**

Go ahead and test drive your *VIP* membership for the next month and see for yourself. You have nothing to lose!

Your purchase is backed by our **money-back guarantee** that you can cancel any time within the first 30 days and receive a **100%** refund, no questions asked.

We promise there will never be another charge for your *VIP* upgrade in the future. No annoying monthly subscription, just a single charge of only \$97.

Don't delay, this invitation to upgrade to our *VIP* premiere membership is valid for **only** 48 hours!

Sincerely,

Sandy Franks
Membership Director



P.S. Don't miss out on your exclusive invitation to participate fully in our webinars for less than half the price! Your *VIP* discount expires in 48 hours.

CS Rep: Hello, thank you for calling Budget Brainiacs. My name is Michele, how can I help you today?

Caller: Hello. I am calling to change my address.

CS Rep: I'll be happy to help you update your address. May I please have your name and account number?

Caller: My name is Barb Jones. My account number is 1234567.

Michele: Thank you, Barb. I have your account up. Can you please verify your account password?

Barb: Pickles.

Michele: Thank you. What is your new address?

Barb: 1234 A St., Ventura, CA 93003.

Michele: Thank you. I have updated your address to 1234 A St., Ventura, CA 93003. Was there anything else I can help you with?

Barb: No, that was it.

Michele: We thank you for being with us for 2 years Barb. May I ask what you like about the program?

Barb: I enjoy spending time with my 5 grandkids in the Budget Brainiacs Family Center. Whoever has the highest score picks the activity we do for the rest of the day. They have fun learning with the games. They each earned a lot of bonus points for great prizes. My oldest are teenagers now. We're working with a checking account and buying a car. It's a great program for everyone. I must admit that I've had fun with it too.

Michele: That sounds like some fun family time. What a great idea for the winner to pick the day's activity. Would you allow us to use your comment as a testimonial?

Barb: Sure. I don't mind.

Michele: Thank you. Have I resolved the reason for your call today?

Barb: Yes, thank you.

Michele: You're very welcome. Thank you for keeping your account current and for the testimonial Barb. If you have any questions in the future, please give us a call, or try our convenient chat option on the website available 24 hours a day. Have a nice day.