

Monthly Comms Pack

White-label communications for wealth managers and financial advisers. Social media, newsletters, website copy, and direct client communications, all co-branded with your firm.

£32,224

MEAN ISA DEPOSIT

£590,968

MEAN PENSION POT

47

ACCUMULATION INDEX

58

DECUMULATION INDEX

75.0%

TAX-FREE UPTAKE

1. SOCIAL MEDIA CONTENT

LINKEDIN / X / WEBSITE POSTS

□ The 2026/27 tax year is underway. Planning ahead gives you more time to make the most of your allowances. Average ISA deposits this month: £32,224. Every year you don't use your £20,000 allowance, you lose it.

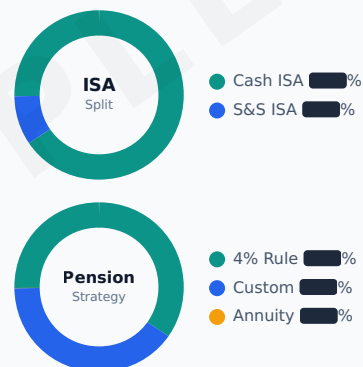
□ Thinking about accessing your pension? The average pot right now is £590,968, and 75.0% of people are taking their full 25% tax-free lump sum. Know your options before you decide.

□ More savers are choosing Stocks & Shares ISAs this month, now 9.4% of new accounts. With the base rate at 4.5%, it's worth reviewing where your money is working hardest.

□ 12.0% of savers switched or compared ISA providers this month. Better rates and features are out there, and a few minutes of comparison could be worth hundreds over the year.

Full version includes all posts, co-branded with your firm

HOUSEHOLD WEALTH SNAPSHOT





2. NEWSLETTER COPY

CLIENT NEWSLETTER / EMAIL CAMPAIGN

April brings a fresh £20,000 ISA allowance and updated pension rules. Early action compounds over the year. This month, savers are putting away an average of £32,224 into their ISAs, with more people choosing Stocks & Shares accounts, now at 9.4% of new subscriptions. With the Bank of England base rate at 4.5%, it's worth checking whether your savings are earning as much as they could.

For those approaching or in retirement, the average pension pot stands at £590,968. 75.0% of people accessing their pension this month are taking their full 25% tax-free lump sum worth around £147,742 on average. Whether you're building savings or planning how to make your retirement income last, a conversation now could make a meaningful difference.

The 2026/27 tax year is underway. Planning ahead gives you more time to make the most of your allowances.

Ready to paste into your branded newsletter, client email, or blog.

3. WEBSITE COPY

LANDING PAGE / HOMEPAGE

A new tax year means a fresh £20,000 ISA allowance. The earlier you use it, the longer it works for you.

Live market data for April 2026

This month's data shows ISA deposits averaging £32,224, with 90.6% going into Cash ISAs and 9.4% into Stocks & Shares. 56.7% of savers are opening their first ISA, a sign that more people are taking control of their finances. Meanwhile, pension pots average £590,968, with 75.0% of people accessing their full tax-free entitlement.

Book a free review to see how your savings compare, and what you could be doing differently.

MARKET CONTEXT

4.5%

BOE BASE RATE

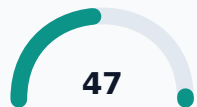
356

DAYS TO TAX YEAR END

New Tax Year, Fresh Start: April brings a fresh £20,000 ISA allowance and updated pension rules. Early action compounds over the year.

4. CHARTS & VISUALS

ACCUMULATION INDEX



SAVINGS MOMENTUM

DECUMULATION INDEX



DRAWDOWN ACTIVITY

TAX-FREE UPTAKE



TAKING 25% LUMP SUM

This is a sample. The full pack includes unredacted content, co-branded with your firm.

Newsletter copy, website content, social posts, client outreach, and existing client communications.

[Request full access at tfe.ai](https://tfe.ai)

SAMPLE



5. CLIENT OUTREACH TEMPLATE

PROSPECT / NEW CLIENT EMAIL

Subject: New Tax Year, Fresh Start: a quick check-in from the team

I wanted to drop you a quick note because april brings a fresh £20,000 isa allowance and updated pension rules. early action compounds over the year.

"With 75.0% of pension savers accessing their tax-free cash this month, it's the right time to consider what your lump sum could achieve — whether that's topping up your ISA, reducing debt, or building a withdrawal plan that lasts."

If you'd like to review your position before 5 April 2027, just let me know. Happy to arrange a call or meeting at a time that suits you.

Personalise with client name and your firm branding. Compliance-safe, data-backed.

LEAD TREND: CLIENT MESSAGE

Tax-free pension cash uptake at 75.0%

TAKING MAX TAX-FREE

CHANGE

"With 75.0% of pension savers accessing their tax-free cash this month, it's the right time to consider what your lump sum could achieve — whether that's topping up your ISA, reducing debt, or building a withdrawal plan that lasts."

6. EXISTING CLIENT COMMUNICATION

MONTHLY CLIENT UPDATE

Subject: April 2026: Your Financial Update

We're writing with your regular update, bringing you the latest on savings and pensions.

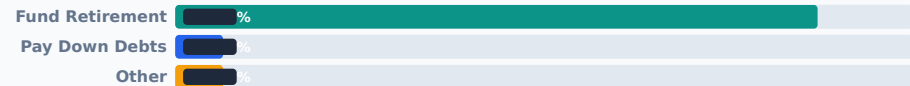
This month, the average ISA deposit is £32,224 and the average pension pot sits at £590,968. The Bank of England base rate is 4.5%. April brings a fresh £20,000 ISA allowance and updated pension rules. Early action compounds over the year.

The 2026/27 tax year is underway. Planning ahead gives you more time to make the most of your allowances. If you'd like to discuss topping up your ISA, reviewing your pension, or simply checking you're on track, we're here to help.

As always, please don't hesitate to get in touch if anything in this update raises questions.

DATA SNAPSHOT: PROVIDER MARKET

PENSION PURPOSE MIX



Request full access at tfe.ai

Unredacted monthly comms packs, co-branded with your firm. Social, newsletter, website, outreach, and client updates.

[Get in touch](#)