

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.

£25,625
MEAN ISA DEPOSIT

£502,500
MEAN PENSION POT

41
ACCUMULATION INDEX

39
DECUMULATION INDEX

38.5%
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: £25,625. Every year you don't use your £20,000 allowance, you lose it.

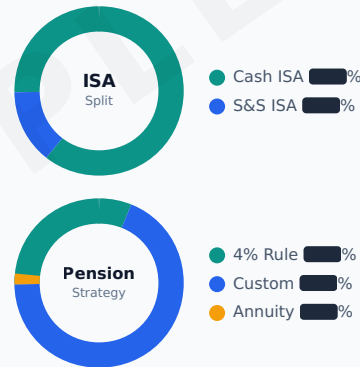
□ Thinking about accessing your pension? The average pot right now is £502,500, and 38.5% of people are taking their full 25% tax-free lump sum. Know your options before you decide.

□ Cash ISAs still lead at 85.8% of new accounts. With the base rate at 4.5%, it's worth reviewing where your money is working hardest.

□ 4.2% 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

Half the tax year gone. A natural checkpoint for savings progress and pension planning. This month, savers are putting away an average of £25,625 into their ISAs, with Cash ISAs remaining the most popular choice at 85.8% of new accounts. 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 £502,500. 38.5% of people accessing their pension this month are taking their full 25% tax-free lump sum worth around £125,625 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

Half the tax year has passed. A quick check-in now keeps your financial plan on track.

Live market data for June 2026

This month's data shows ISA deposits averaging £25,625, with 85.8% going into Cash ISAs and 14.2% into Stocks & Shares. 55.8% of savers are opening their first ISA, a sign that more people are taking control of their finances. Meanwhile, pension pots average £502,500, with 38.5% 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

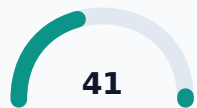
4.5%
BOE BASE RATE

296
DAYS TO TAX YEAR END

Mid-Year Review: Half the tax year gone. A natural checkpoint for savings progress and pension planning.

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: Mid-Year Review: a quick check-in from the team

I wanted to drop you a quick note because half the tax year gone. a natural checkpoint for savings progress and pension planning.

"With 38.5% 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 38.5%

TAKING MAX TAX-FREE

CHANGE

"With 38.5% 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: June 2026: Your Financial Update

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

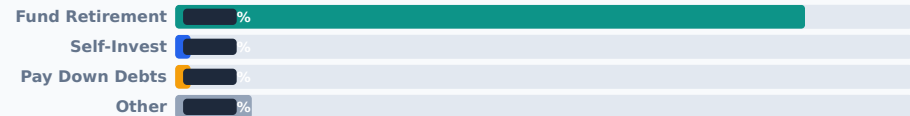
This month, the average ISA deposit is £25,625 and the average pension pot sits at £502,500. The Bank of England base rate is 4.5%. Half the tax year gone. A natural checkpoint for savings progress and pension planning.

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