

# Expert Content Strategy Guide

*Self Serve Templates*

*August 2025*



## Print Flyers, Postcards, Greeting Cards, Brochures, Social Media

The Expert Content library includes self-service templates for admins to create-your-own content. Pre-filled Expert Content is built from these templates and can be configured based on the individual layout's options. Contact blocks, disclaimers, and branding elements are dynamic to the end user.

Many templates include some admin-level configuration options such as:

- Logos: on or off, logo positioning, logo variations (e.g. horizontal/stacked, color/black/white), QR codes
- Colors: font color, color blocks, background colors
- Imagery: replace imagery within a dedicated space, replacing full background images
- Text: replace text in dedicate space (e.g. CTA, header, subheader, paragraph)
- Editability: allow or disallow end user editability of specific elements
- Disclaimers: additional or override disclaimer options to allow admins to enter dynamic disclaimers or include verbiage on a one-off basis.

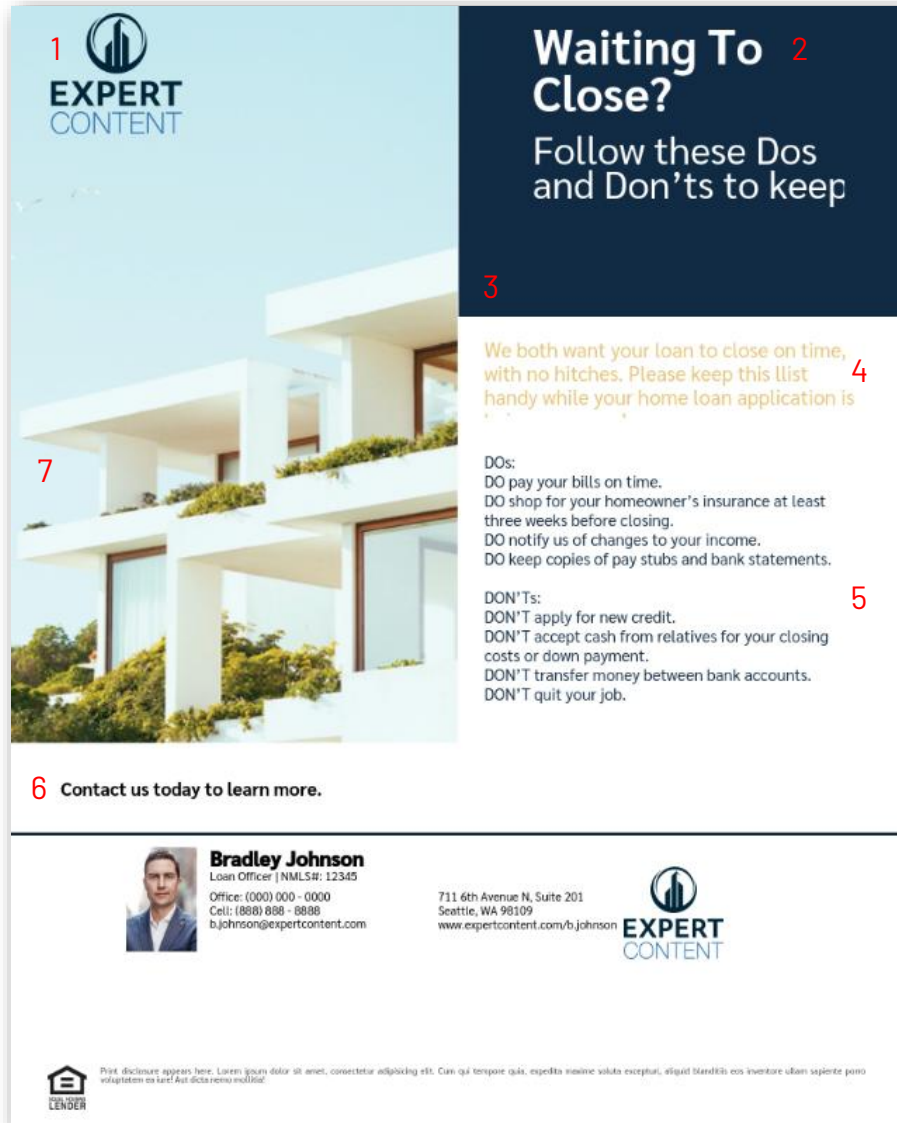
Template types include:

- Various configurable layouts for single-sided print flyers
- Various configurable layouts for postcards in specific sizing; additional "static" options in additional sizes
- Vertical and Horizontal Greeting Cards
- Bifold and trifold brochures
- Social Media templates including Event, Testimonials, and upload-your-own design

# Print Flyers



# Self Serve Print Flyers



- 1 – Ability to switch logo on/off, adjust logo background color
- 2 – Fill to fit headline/sub-headline, change text color
- 3 – Background color default is brand primary color
- 4 – Font default color is brand secondary color
- 5 – Font default color is brand primary color
- 6 – Editable CTA
- 7 – Upload image

Single and cobranded versions available

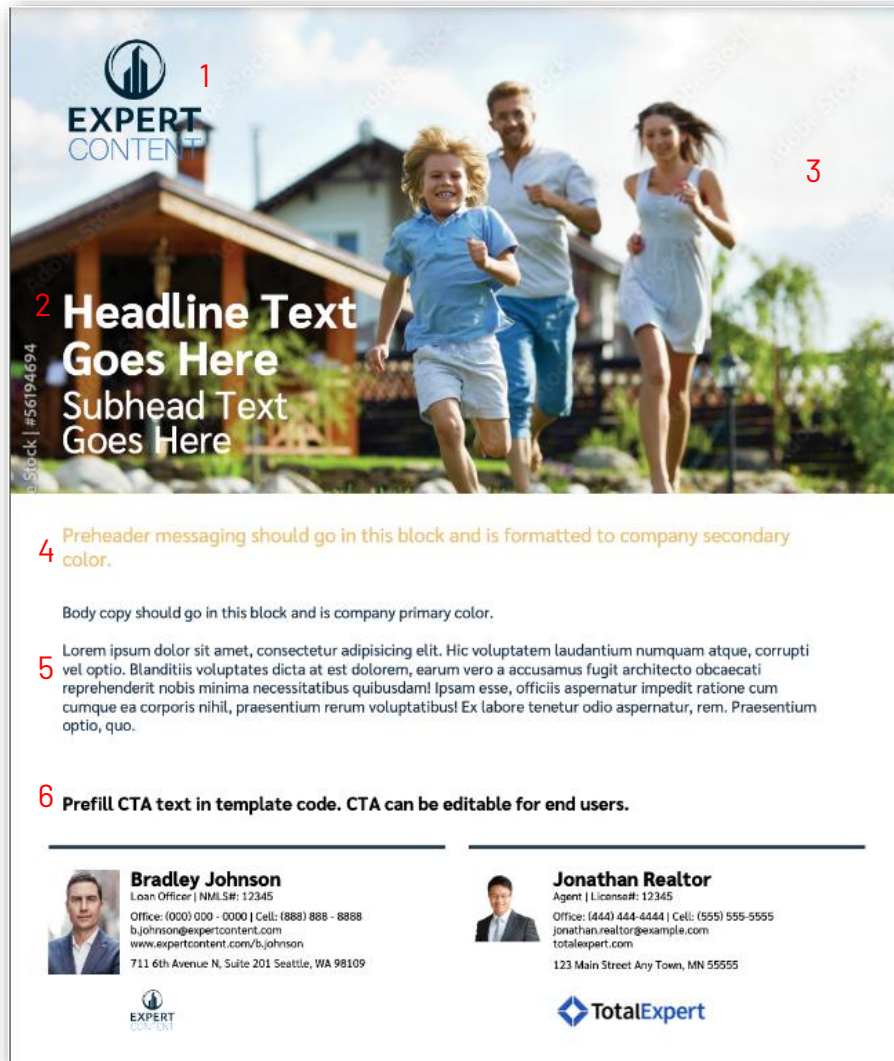
# Self Serve Print Flyers

- 1 – Ability to switch logo on/off, adjust logo background color
- 2 – Fill to fit headline/sub-headline, change text color
- 3 – background color default is brand primary color
- 4 – Font default color is brand secondary color
- 5 – Font default color is brand primary color
- 6 – Editable CTA
- 7 – Upload image
- 8 – Editable image block – QR code will populate from user profile

Single and cobranded versions available



# Self Serve Print Flyers



- 1 – Ability to switch logo on/off, adjust logo background color
- 2 – Fill to fit headline/sub-headline, change text color
- 3 – Upload image
- 4 – Font default color is brand secondary color
- 5 – Font default color is brand primary color
- 6 – Editable CTA

Single and cobranded versions available



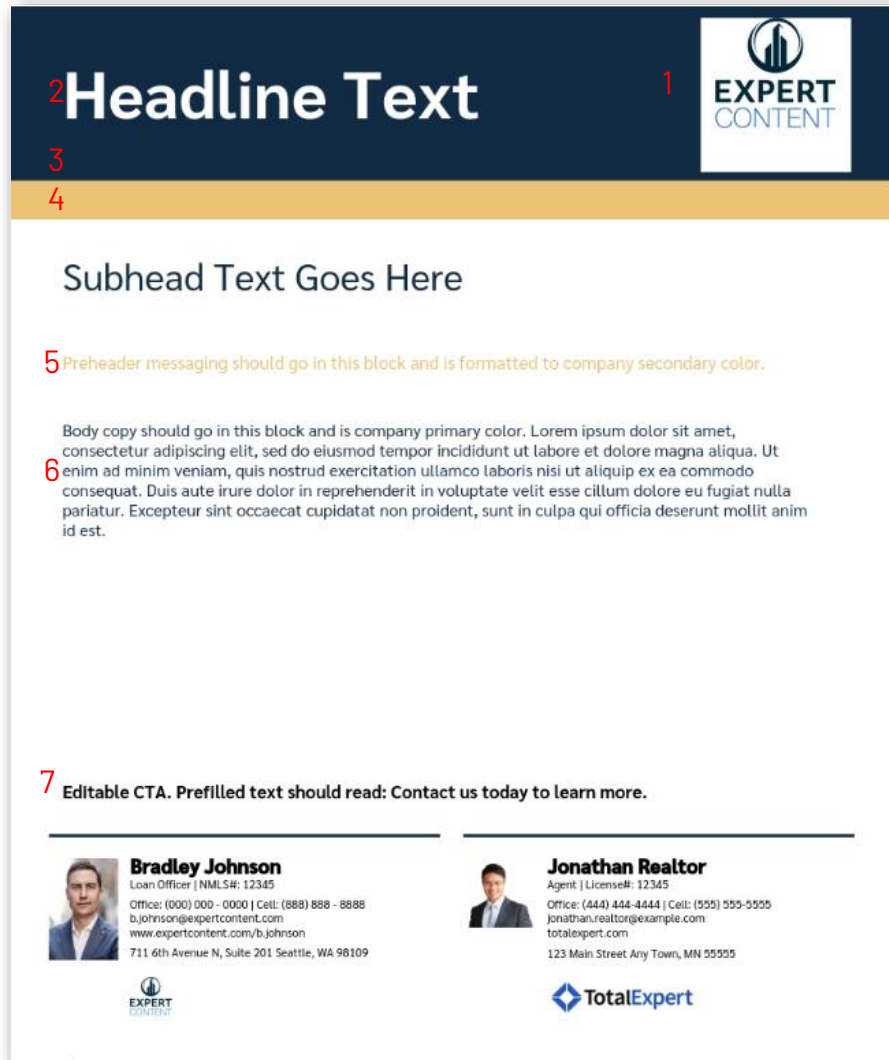
# Self Serve Print Flyers



- 1 – Ability to switch logo on/off, adjust logo background color
- 2 – Fill to fit headline/sub-headline, change text color
- 3 – Upload image
- 4 – Font default color is brand secondary color
- 5 – Font default color is brand primary color
- 6 – Editable CTA

Single and cobranded versions available

# Self Serve Print Flyers

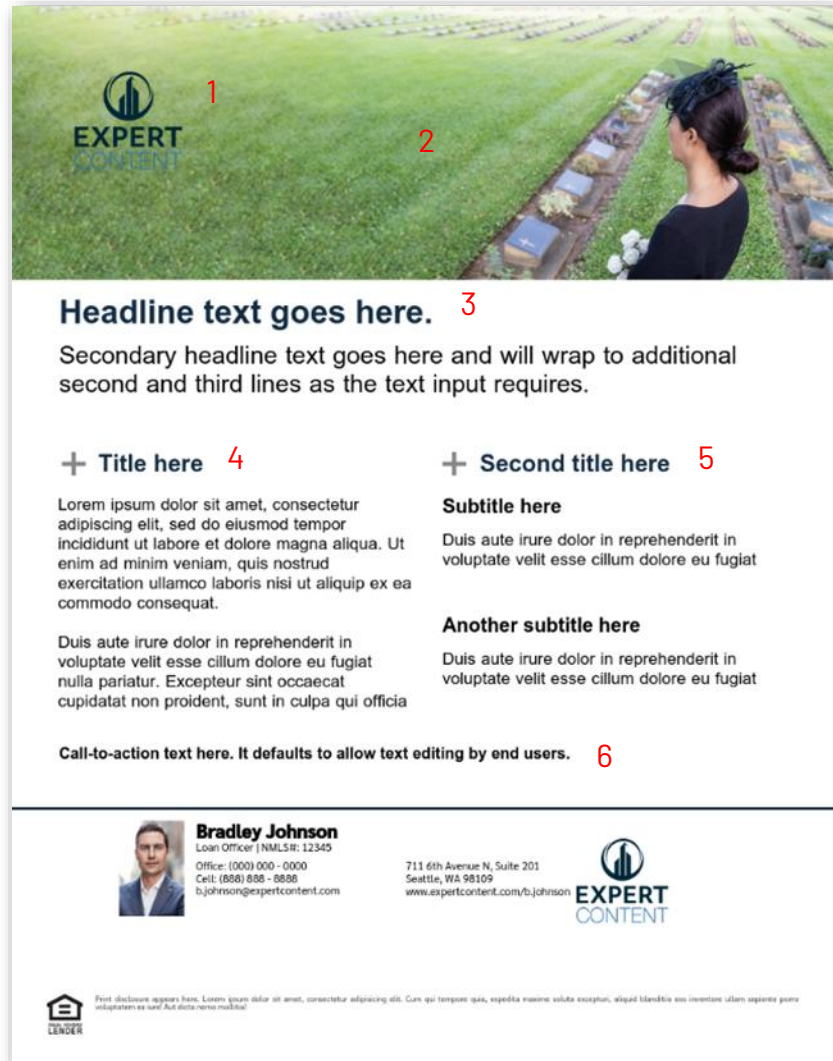


- 1 – Ability to switch logo on/off, adjust logo background color
- 2 – Fill to fit headline/sub-headline, change text color
- 3 – Default to brand primary color
- 4 – Default to brand secondary color
- 5 – Font default color is brand secondary color
- 6 – Font default color is brand primary color
- 7 – Editable CTA

Single and cobranded versions available



# Self Serve Print Flyers



1 – Ability to switch logo on/off, adjust logo background color

2 – Upload image

3 – Fill to fit headline/sub-headline, change text color

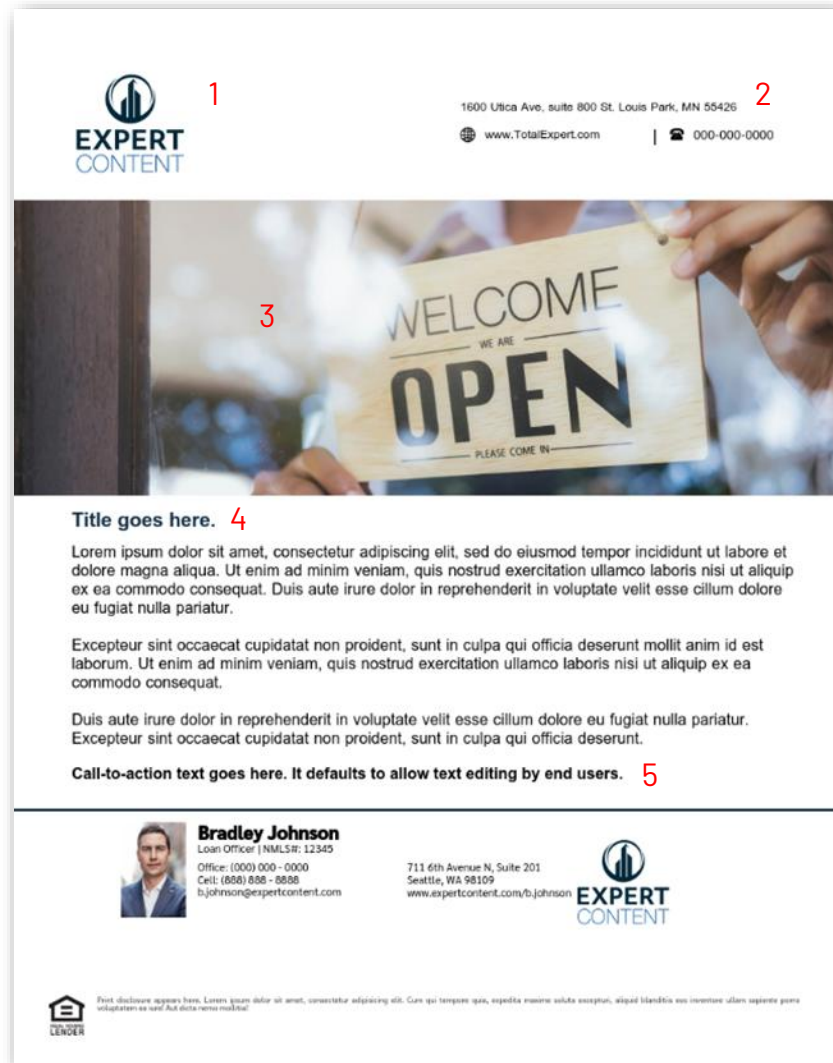
4 – Font default color is brand primary color

5 – Font default color is brand primary color

6 – Editable CTA

Single and cobranded versions available

# Self Serve Print Flyers



1 – Ability to switch logo on/off, adjust logo background color

2 – Dynamic user information

3 – Upload image

4 – Fill to fit headline/sub-headline, change text color

5 – Editable CTA

Single and cobranded versions available

# Self Serve Print Flyers



1 – Ability to switch logo on/off, adjust logo background color

2 – Upload image

3 – Fill to fit headline/sub-headline, change text color

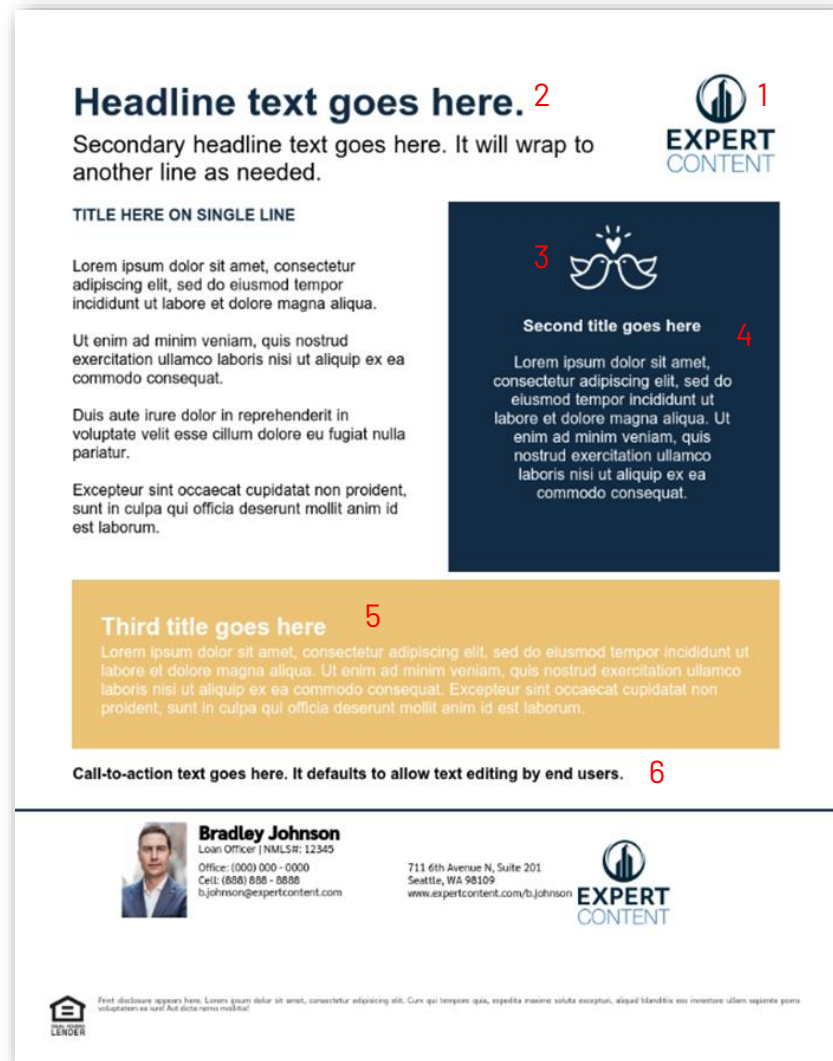
4 – Background color default is brand primary color, change text color

5 – Background color default is brand secondary color, change text color

6 – Editable CTA

Single and cobranded versions available

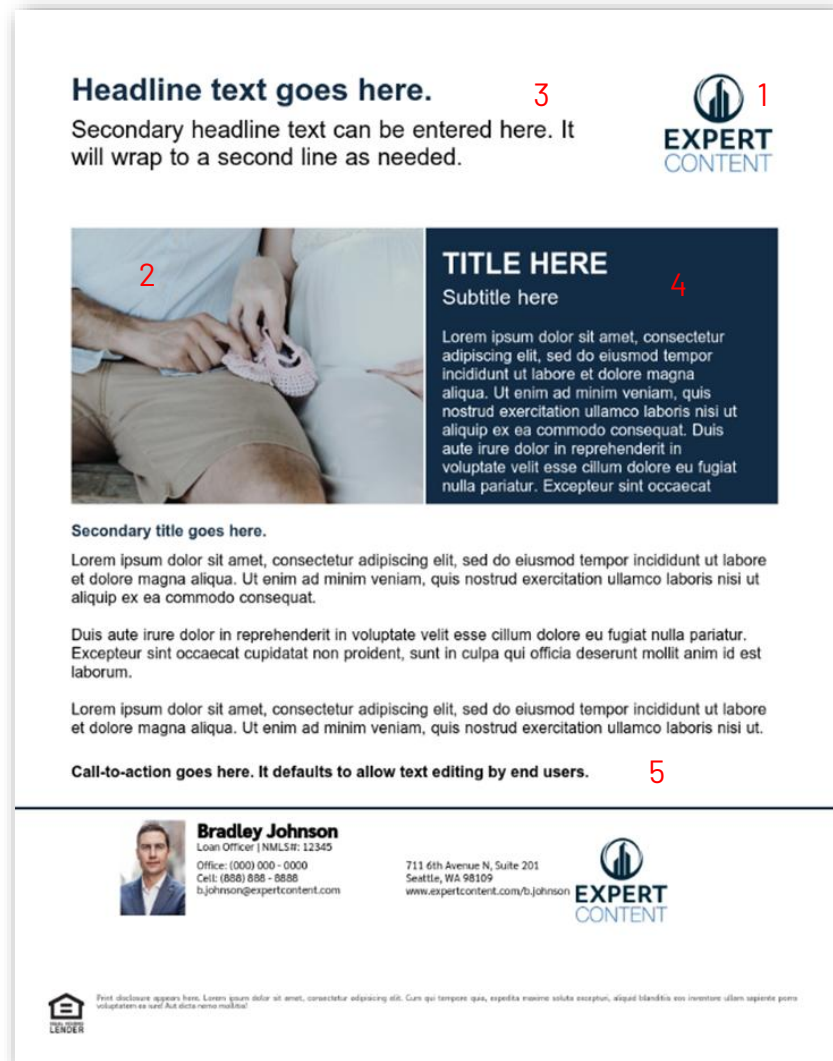
# Self Serve Print Flyers



- 1 – Ability to switch logo on/off, adjust logo background color
- 2 – Fill to fit headline/sub-headline, change text color
- 3 – Upload icon image
- 4 – Background color default is brand primary color, change text color
- 5 – Background color default is brand secondary color, change text color
- 6 – Editable CTA

Single and cobranded versions available

# Self Serve Print Flyers



1 – Ability to switch logo on/off, adjust logo background color

2 – Upload image

3 – Fill to fit headline/sub-headline, change text color

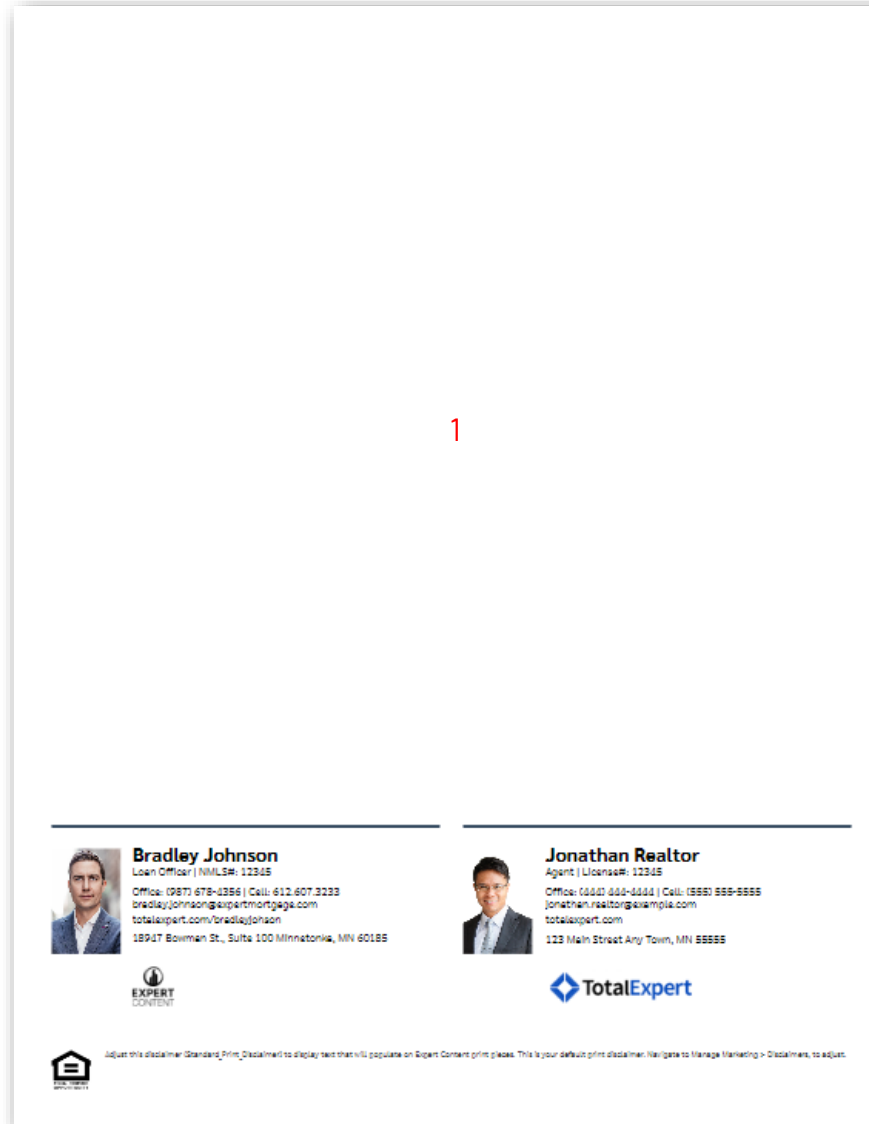
4 – Background color default is brand secondary color, change text color

5 – Editable CTA

Single and cobranded versions available



# Self Serve Print Flyers



1 – Upload image, will replace entire background image of the full 8.5"x11" flyer

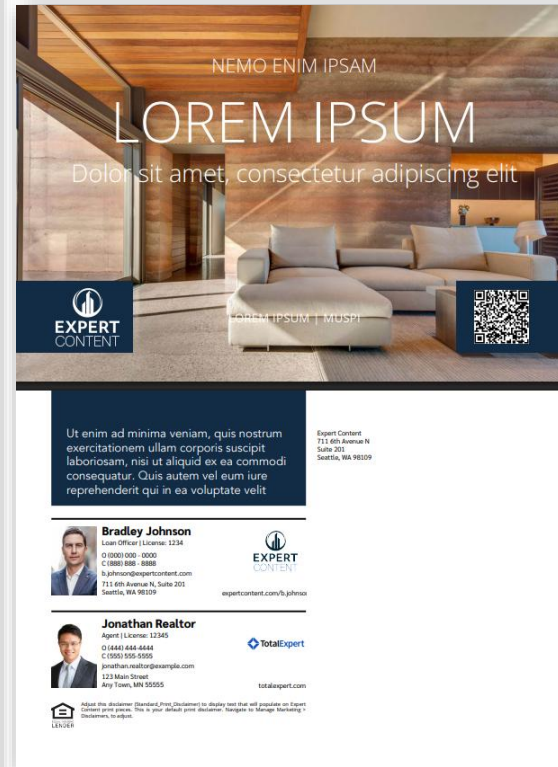


# Postcards



# EDDM: 9"x6.25"

## Direct & Non-Direct Mail: 9"x6"

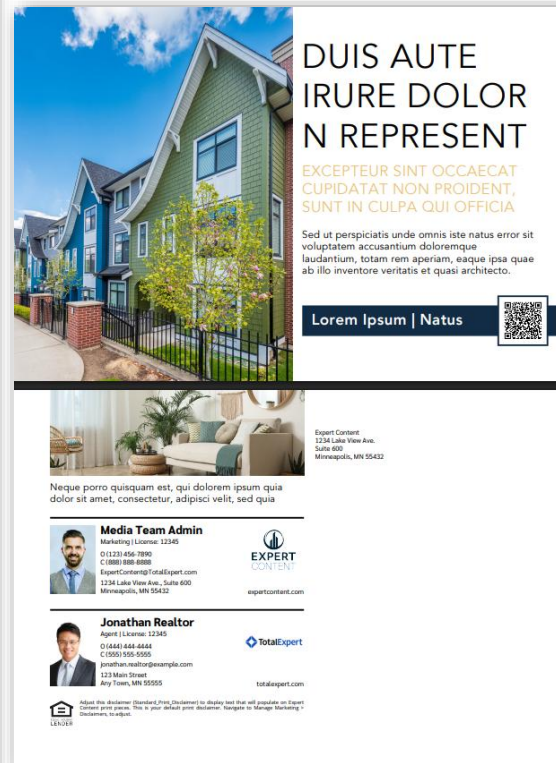
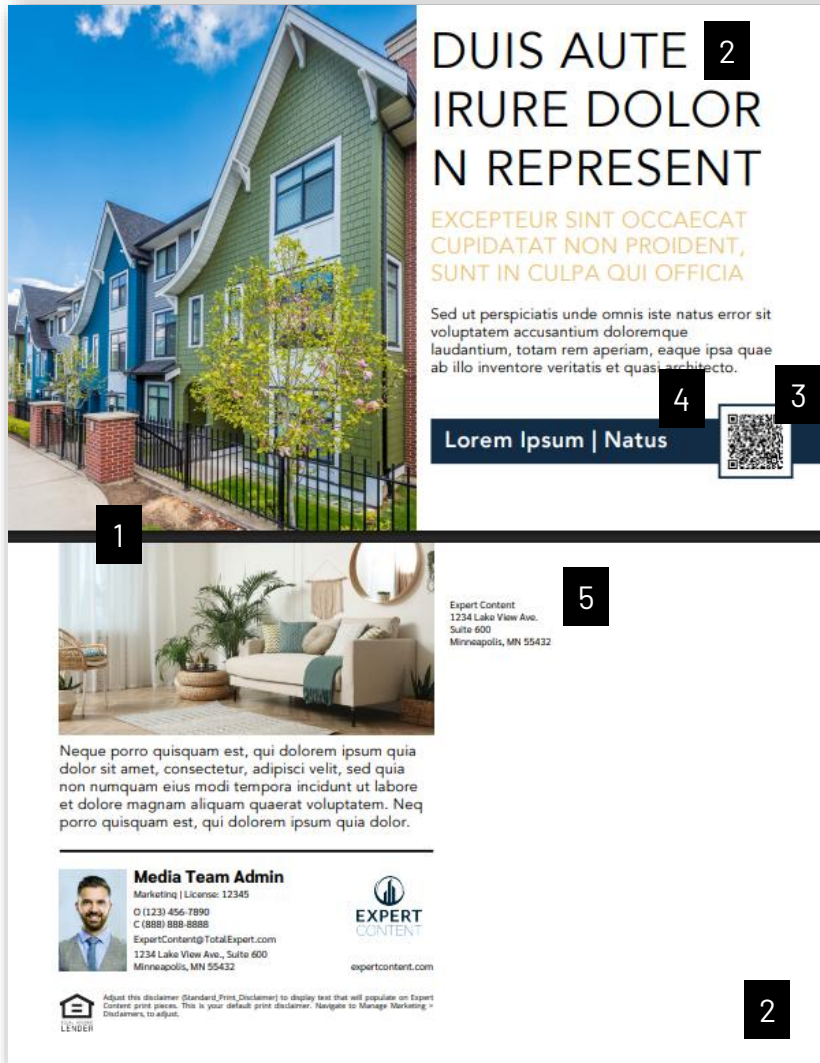


- 1 – Switch logo on/off, adjust logo background color, use logo variations from branding, editability option
- 2 – Upload background image(s), editability option
- 3 – QR code variation, switch on/off, editability option
- 4 – Fill to fit text elements, change text color, editability option
- 5 – Color block default is brand primary color; change color, turn all color blocks on/off
- 6 – Return address default text, leave blank, editability option

*Functionality is the same for single and cobranded versions*

# EDDM: 9"x6.25"

## Direct & Non-Direct Mail: 9"x6"



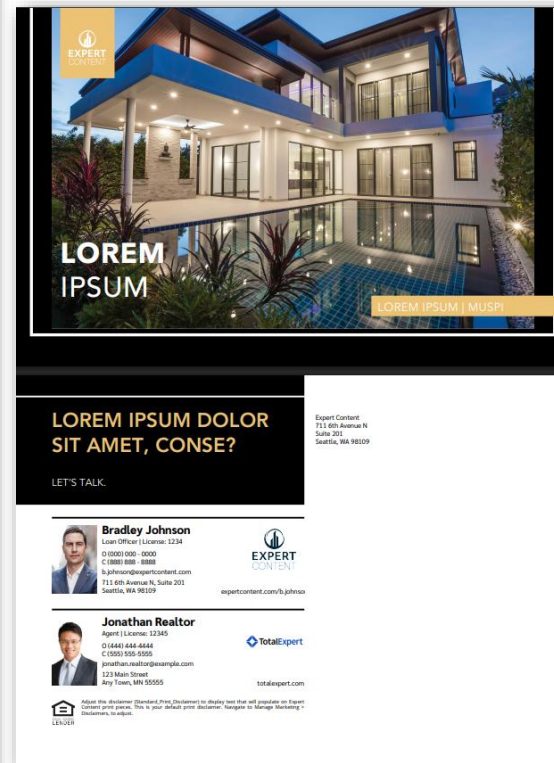
- 1 – Upload image(s), editability option
- 2 – Fill to fit text elements, change text color, editability option
- 3 – QR code variation, switch on/off, editability option
- 4 – Color block default is brand primary color; change color, turn all color blocks on/off
- 5 – Return address default text, leave blank, editability option

*Functionality is the same for single and cobranded versions*



# EDDM: 9"x6.25"

## Direct & Non-Direct Mail: 9"x6"



- 1 – Switch logo on/off, adjust logo background color, use logo variations from branding, editability option
- 2 – Upload image(s), editability option
- 3 – Fill to fit text elements, change text color, editability option
- 4 – Front color blocks default to secondary; change color
- 5 – Turn color blocks on/off (removes front secondary color blocks and back black block)
- 6 – Background color defaults to black; change color. Border color defaults to white; change color.
- 7 – Return address default text, leave blank, editability option

*Functionality is the same for single and cobranded versions*

# EDDM: 9"x6.25"

## Direct & Non-Direct Mail: 9"x6"



- 1 – Switch logo on/off, adjust logo background color, use logo variations from branding, editability option
- 2 – Upload image(s), editability option
- 3 – Fill to fit text elements, change text color, editability option
- 4 – QR code variation, switch on/off, editability option
- 5 – Return address default text, leave blank, editability option

*Functionality is the same for single and cobranded versions*

# EDDM: 9"x6.25"

## Direct & Non-Direct Mail: 9"x6"

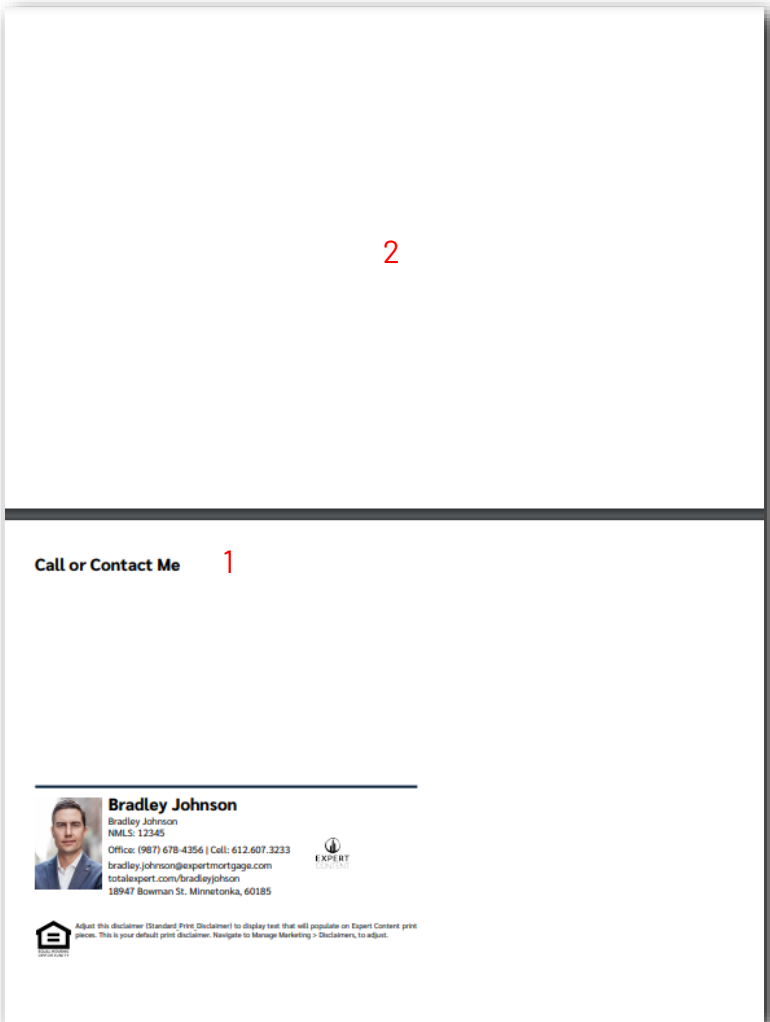
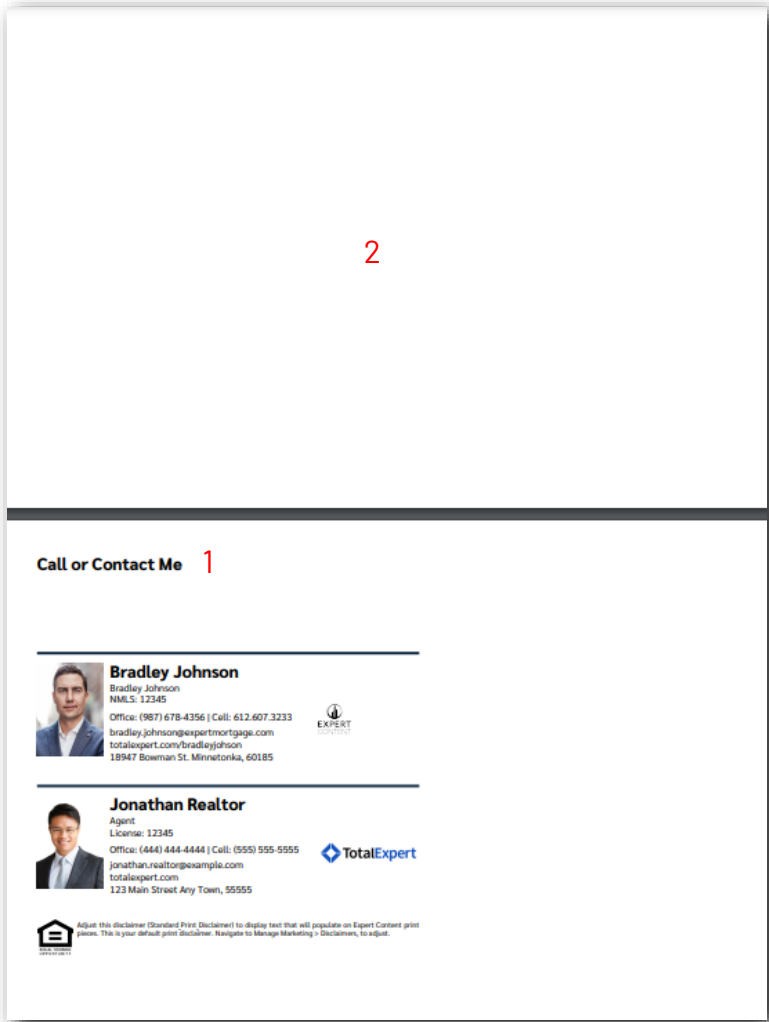


- 1 – Switch logo on/off, adjust logo background color, use logo variations from branding, editability option
- 2 – Upload image(s), editability option
- 3 – Fill to fit text elements, change text color, editability option
- 4 – Front color blocks default to secondary; change color, turn color blocks on/off
- 5 – Return address default text, leave blank, editability option

Functionality is the same for single and cobranded versions

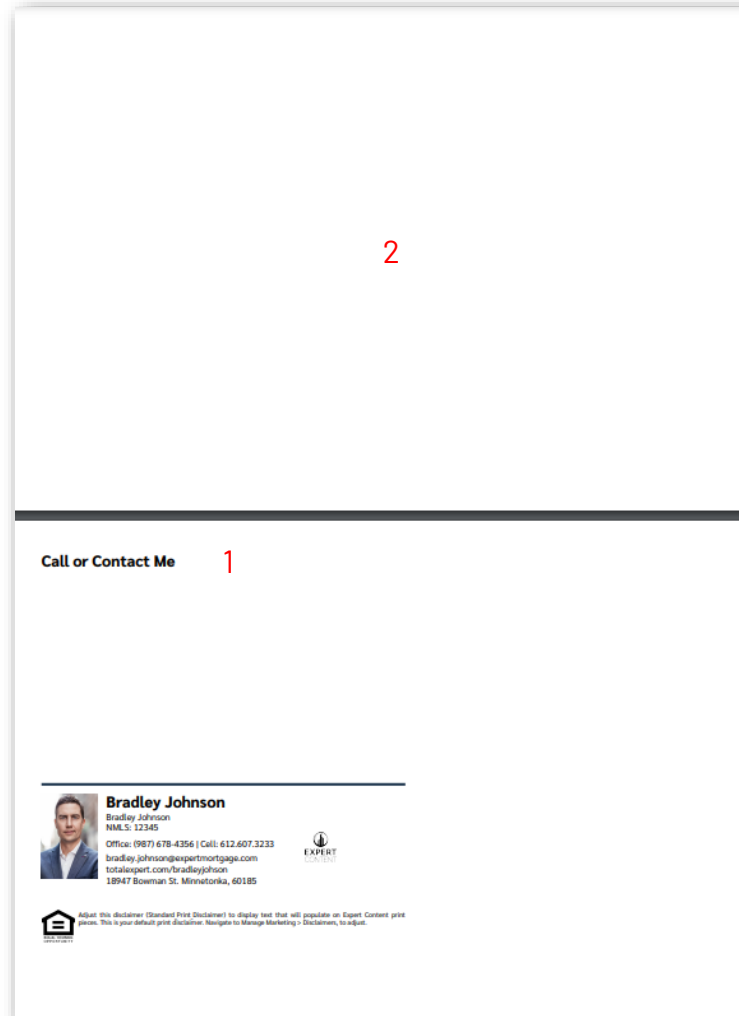
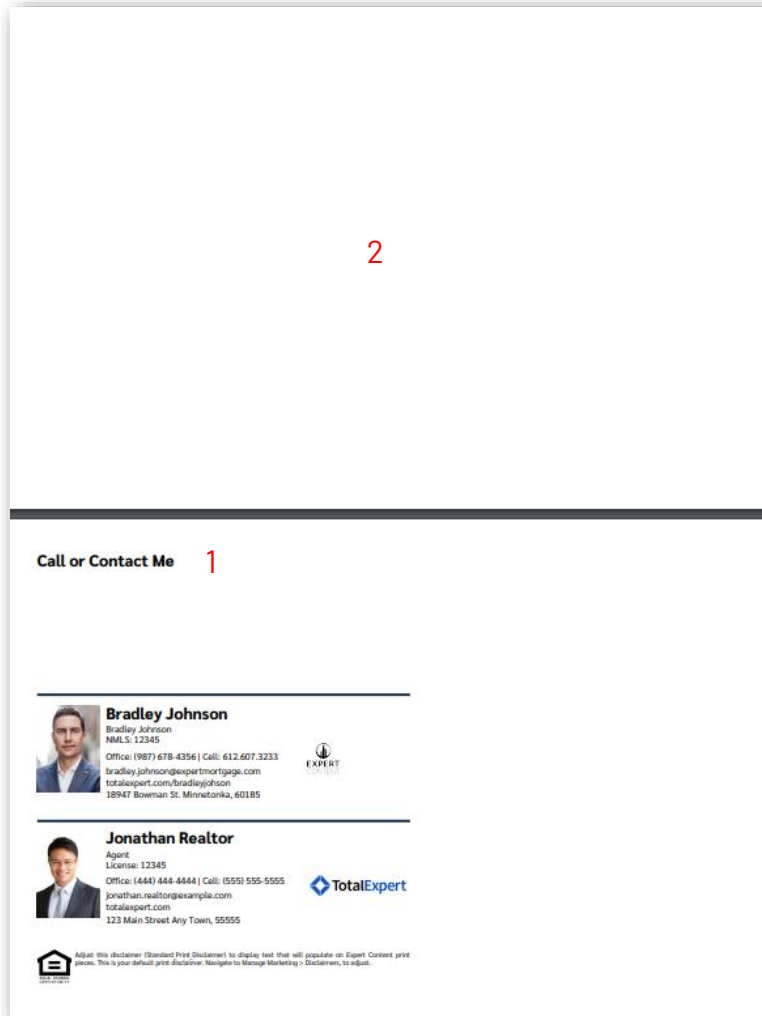


# Direct & Non-Direct Mail Postcards: 8.5"x5.5"



- 1 – Editable CTA
- 2 – Upload image

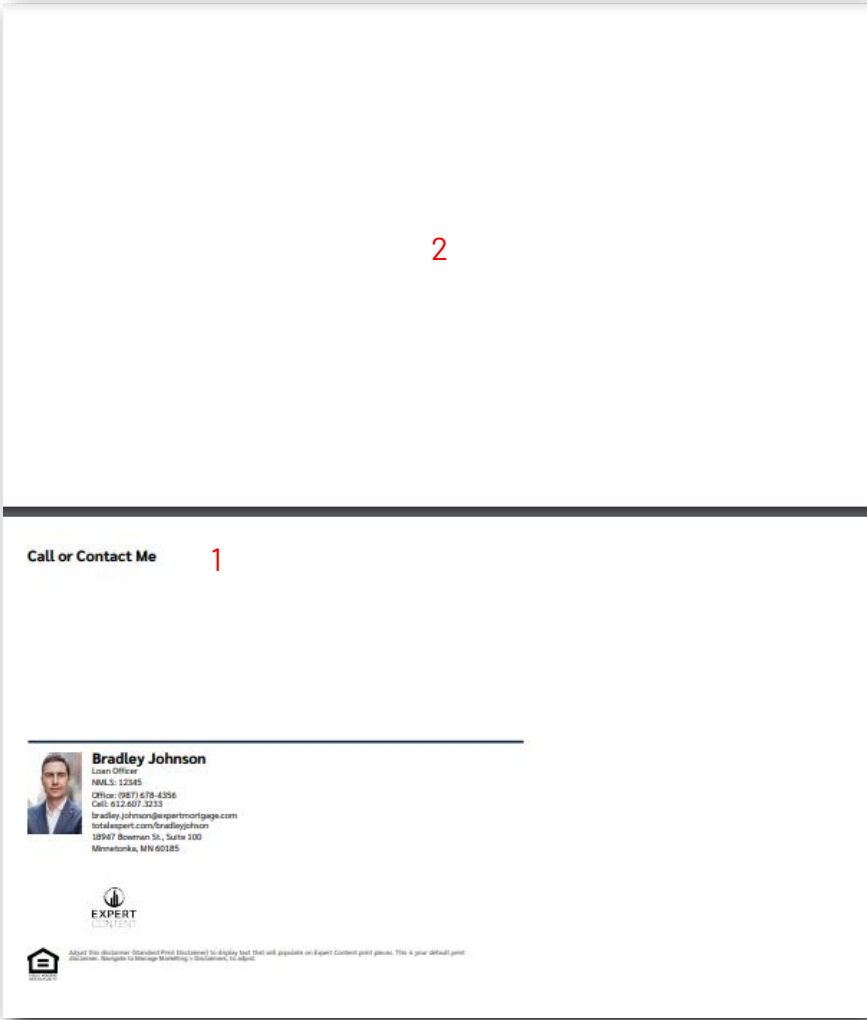
# Direct & Non-Direct Mail Postcards: 9"x6"



1 – Editable CTA

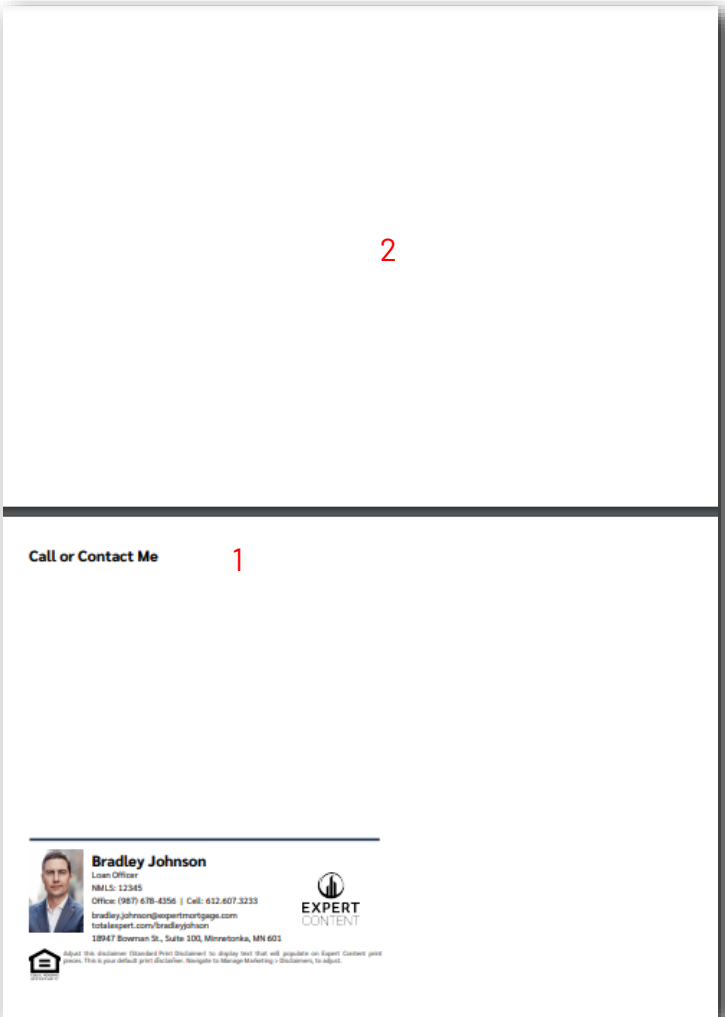
2 – Upload image

# EDDM Postcards: 11"x6.25"



- 1 – Editable CTA
- 2 – Upload image

# EDDM Postcards: 9"x6.25"

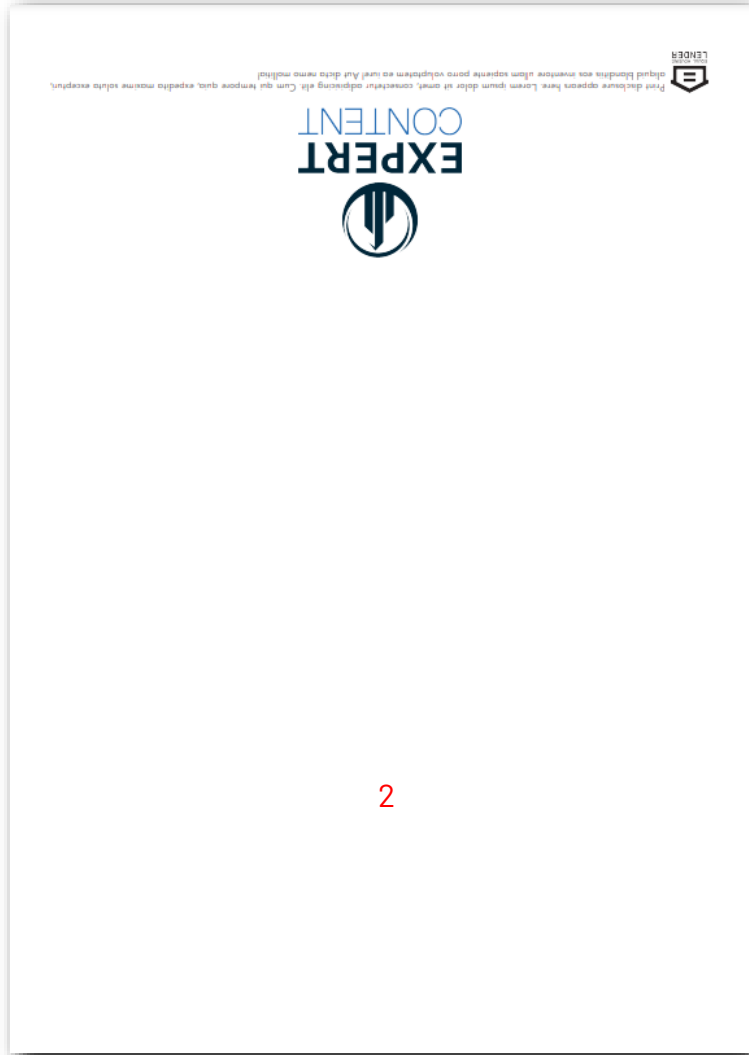


- 1 – Editable CTA
- 2 – Upload image

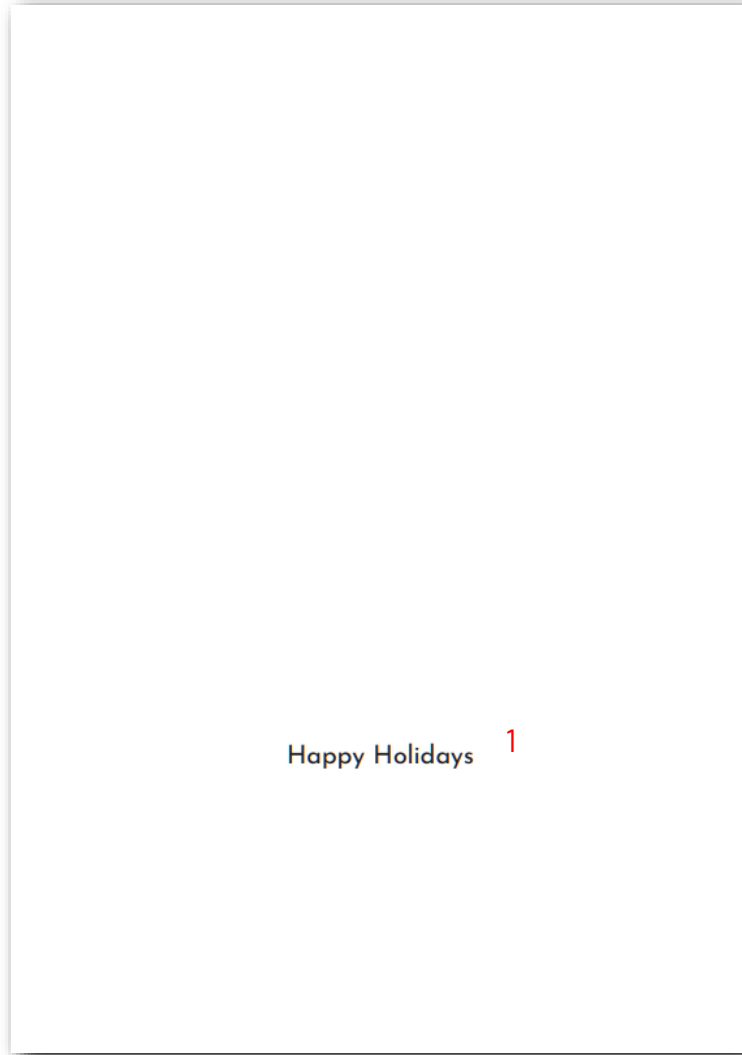
# Greeting Cards



# Horizontal Greeting Cards



Outside



Inside

- 1 – Editable greeting
- 2 – Upload image



Envelope



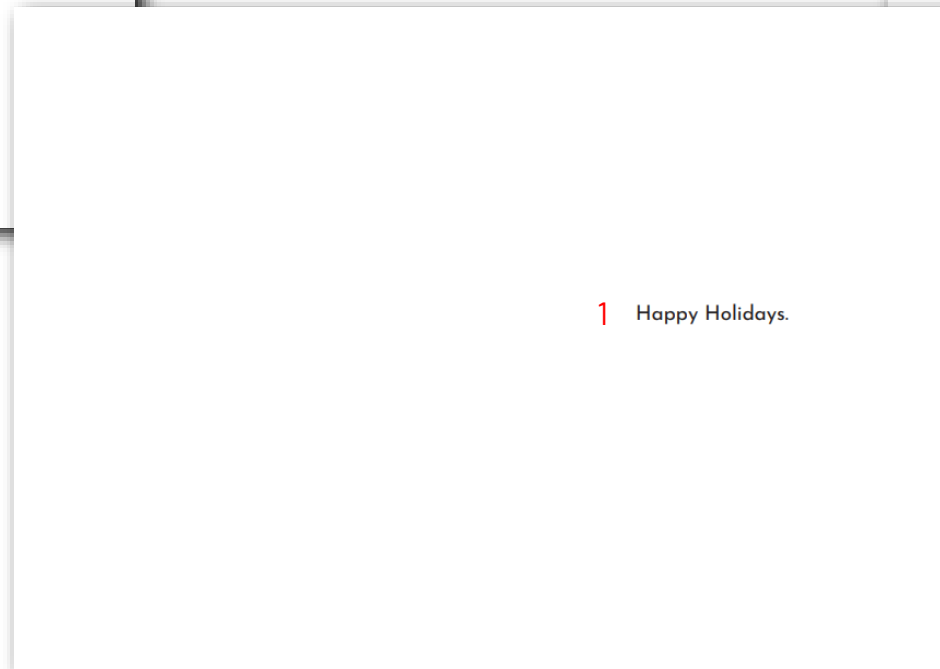
# Vertical Greeting Cards



Outside



Envelope



Inside

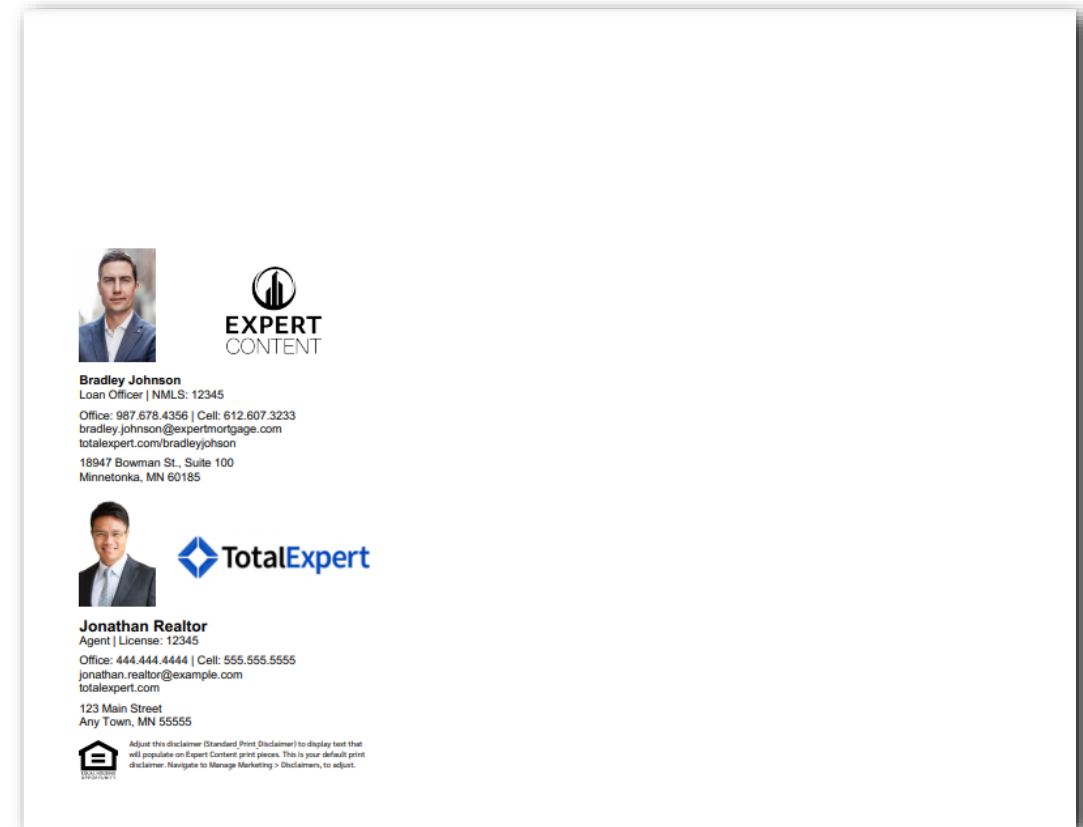
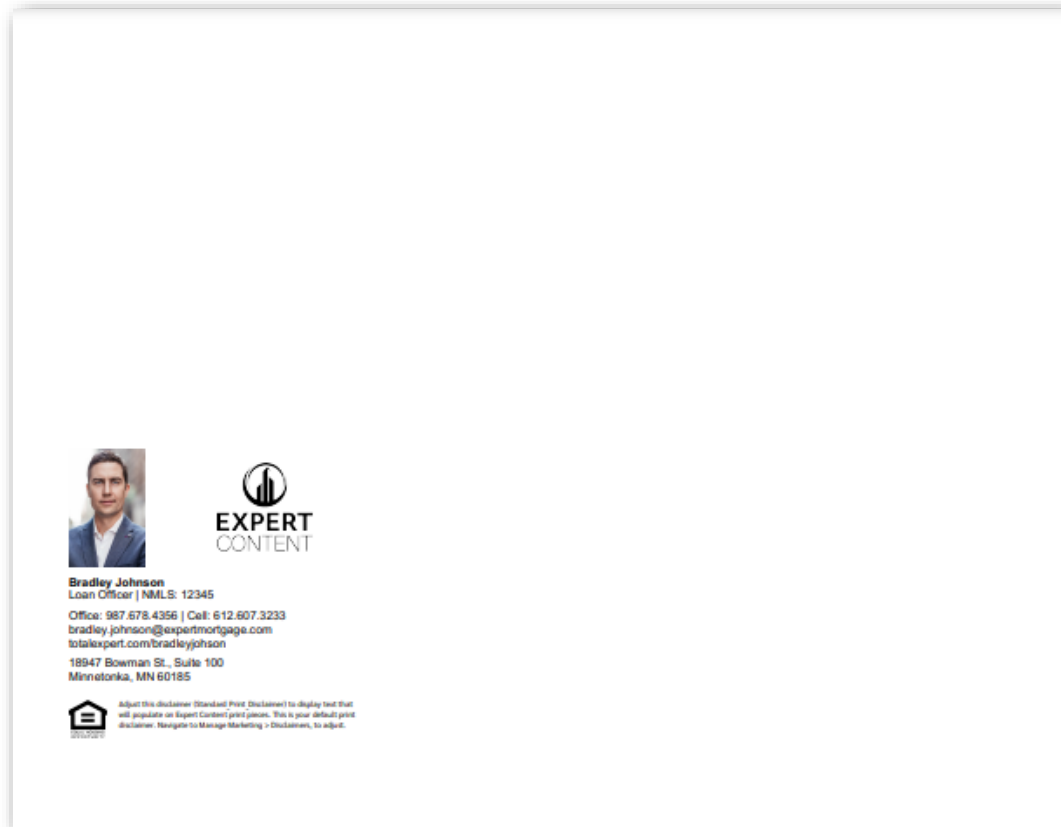
1 – Editable greeting

2 – Upload image

# Brochures

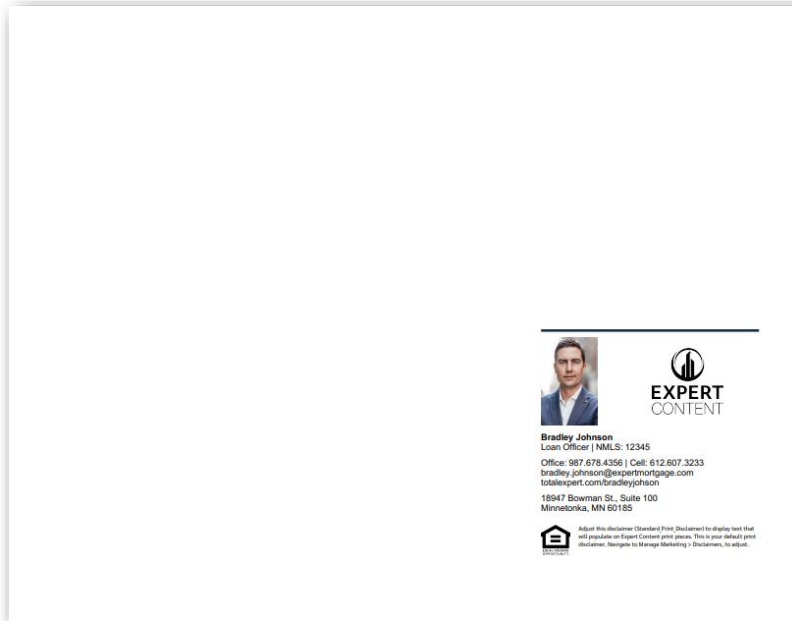


# Bifold Brochures

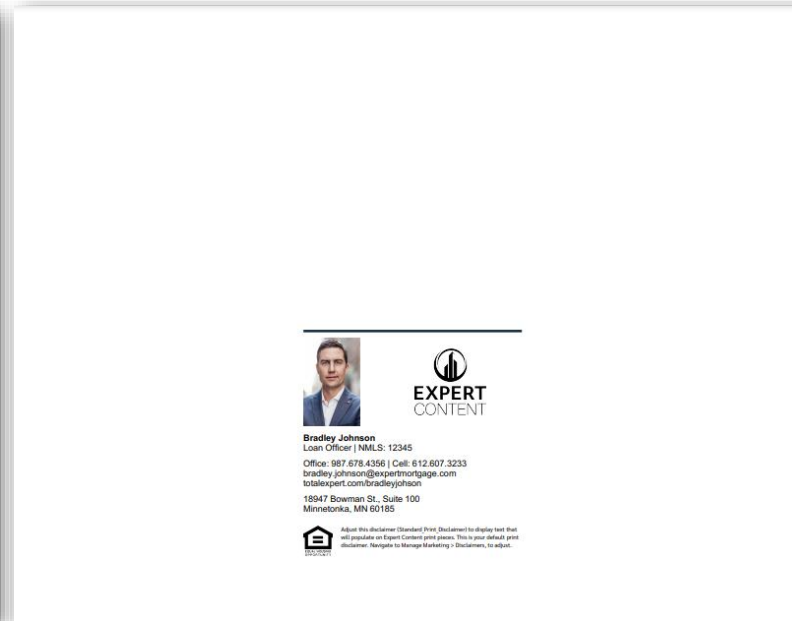


Bifold Brochures include only the dynamic contact block. Admins upload two background images with finished artwork for the front and back, with space left for the contact area. Once printed, they will be folded in half. There are single and co-branded versions of this template with the contact block place on the back when printed and folded.

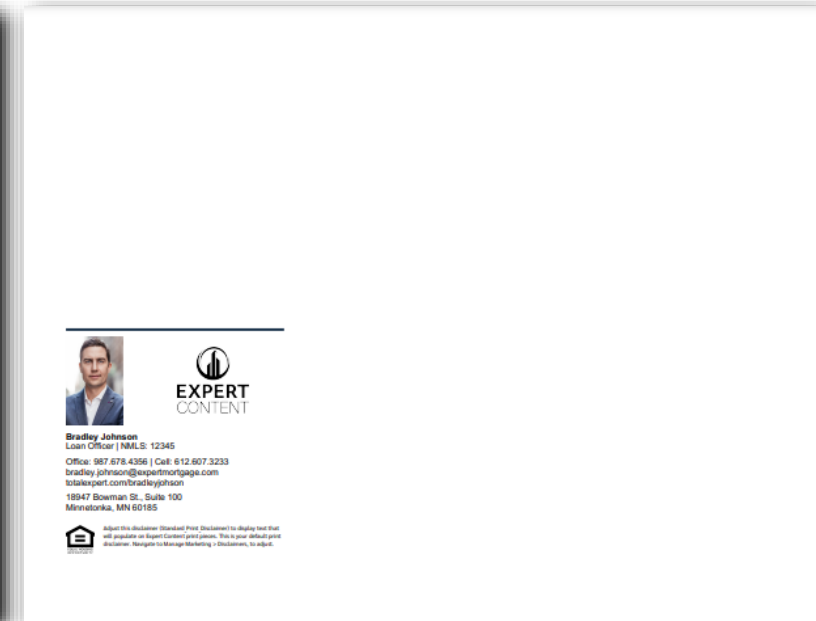
# Trifold Brochures – single branded



Trifold Option A



Trifold Option B



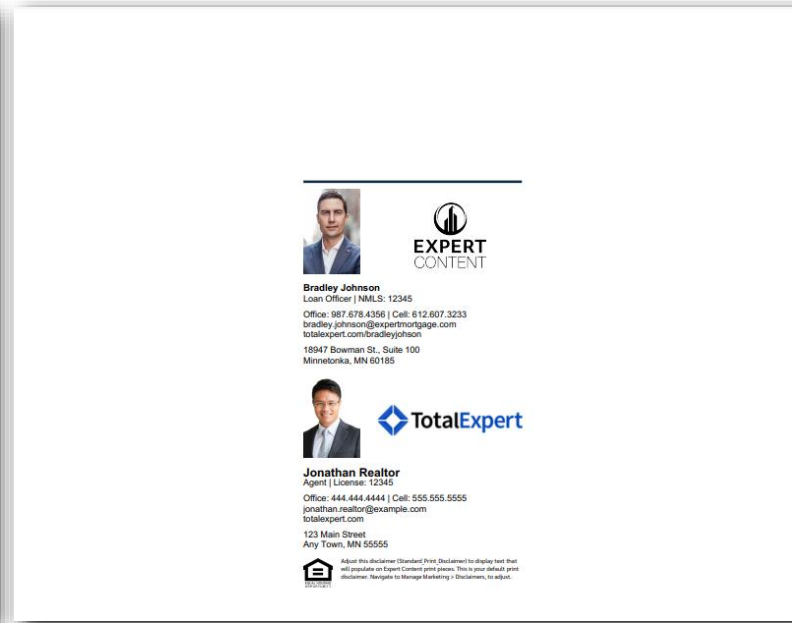
Trifold Option C

Trifold Brochures include only the dynamic contact block. Admins upload two background images with finished artwork for the front and back, with space left for the contact area. Once printed, they will be folded in thirds. Three single branded templates are provided where the contact block is placed on different sections of the folded brochure.

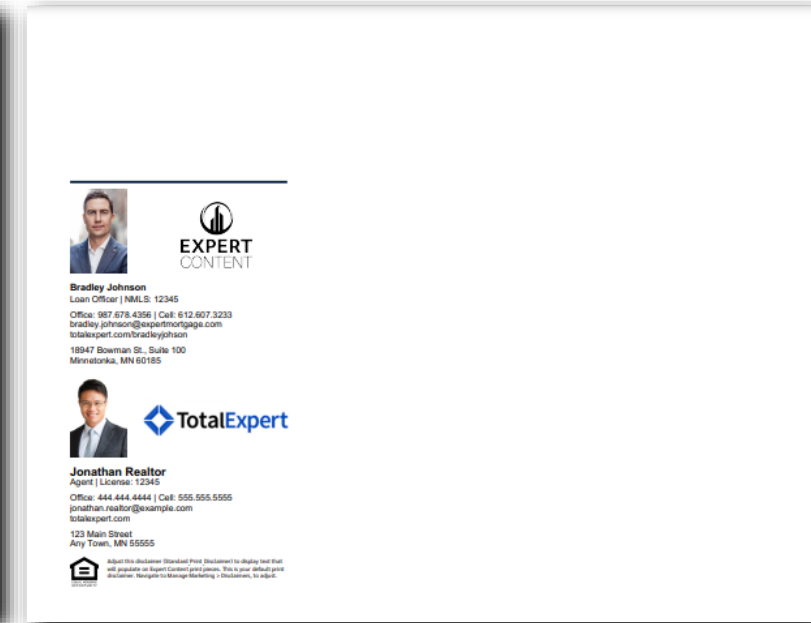
# Trifold Brochures – cobranded



Trifold Option A



Trifold Option B



Trifold Option C

Trifold Brochures include only the dynamic contact block. Admins upload two background images with finished artwork for the front and back, with space left for the contact area. Once printed, they will be folded in thirds. Three cobranded templates are provided where the contact block is placed on different sections of the folded brochure.

# Social Media





# Social Media Self Serve



- 1 – Ability to switch logo on/off, adjust logo background color
- 2 – Fully editable CTA and headline
- 3 – Color blocks are brand secondary color
- 4 – Editable fields
- 5 – Upload image
- 6 – Transparent, none, white, black disclaimer block

# Social Media Self Serve

1



3



**Bradley Johnson**  
 Loan Officer  
 NMLS # 12345  
 Phone: (888) 888 - 8888  
[www.expertcontent.com/b.johnson](http://www.expertcontent.com/b.johnson)

2 Editable CTA - [www.mywebsite.com](http://www.mywebsite.com)



Adjust this disclaimer (Standard\_Social\_Disclaimer) to display text that will populate on Expert Content social pieces. This is your default social disclaimer. Navigate to Manage Marketing > Disclaimers, to adjust.

6

4

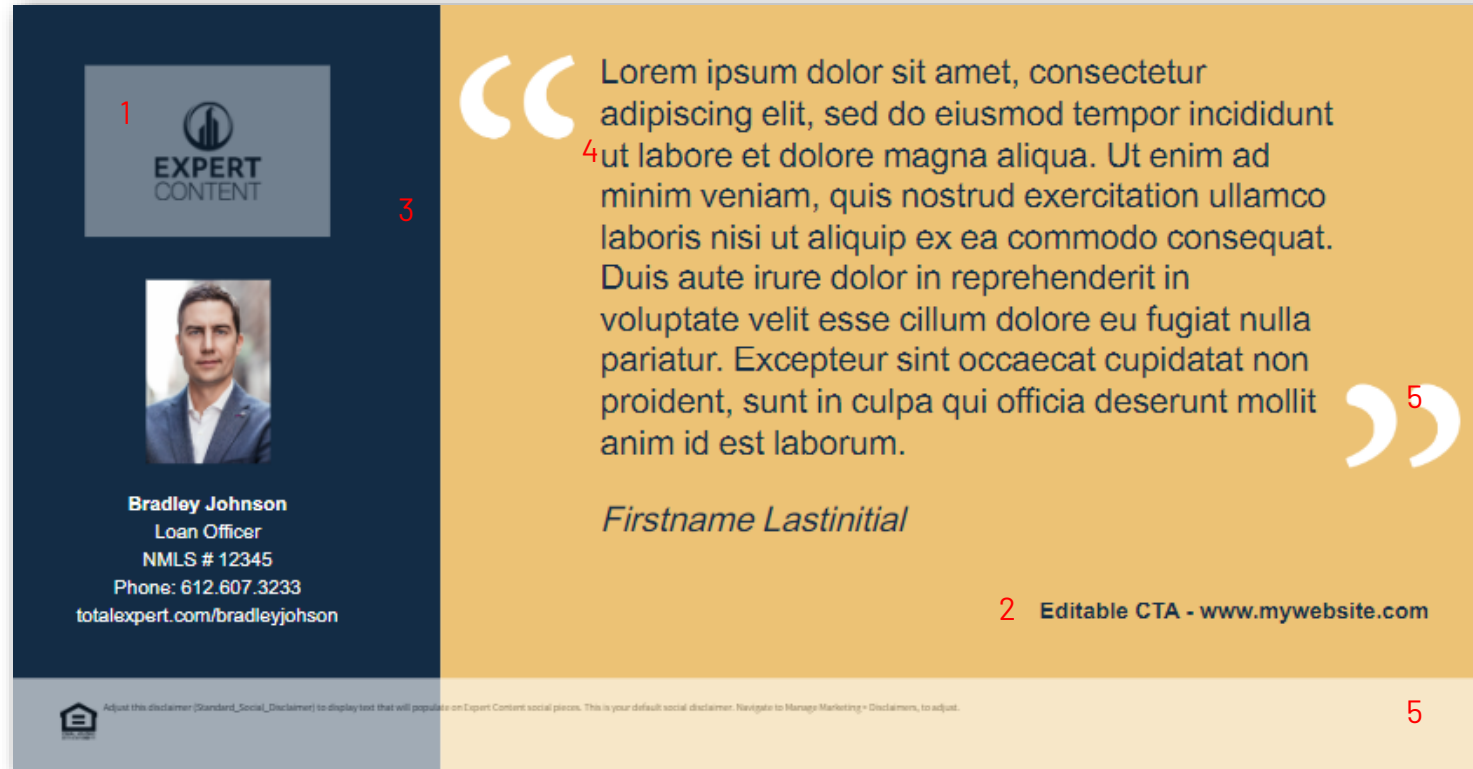
## What our customers are saying

"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."

Firstname Lastinitial

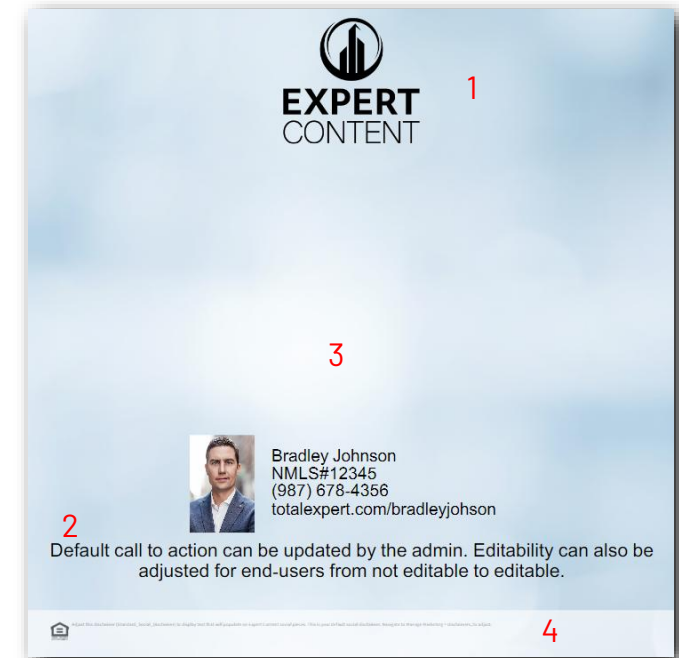
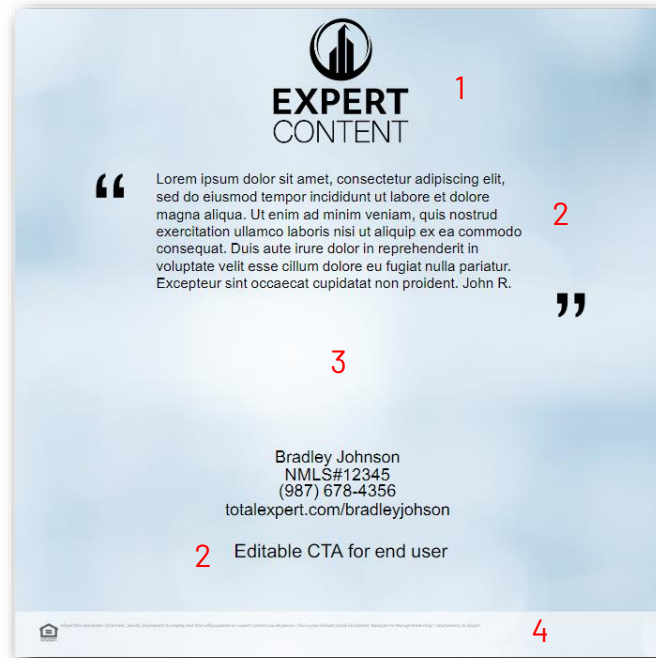
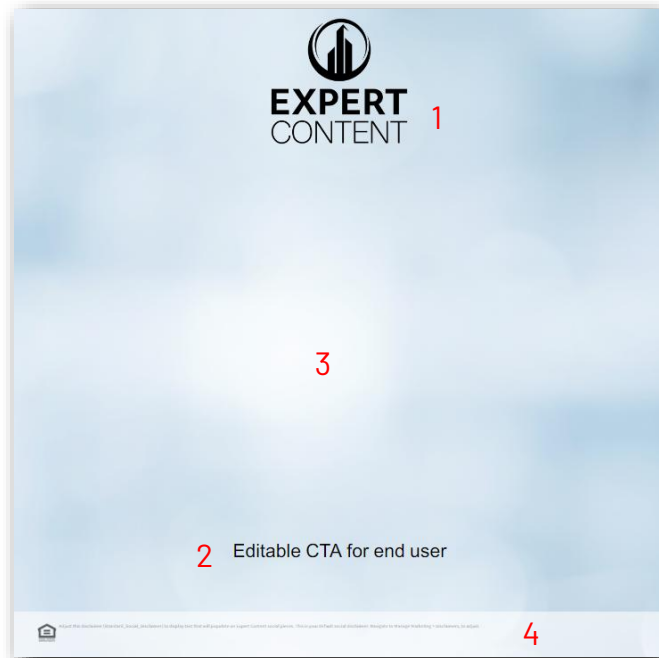
- 1 – Ability to switch logo on/off, adjust logo background color
- 2 – Fully editable CTA and headline
- 3 – Color blocks are brand secondary color
- 4 – Editable fields
- 5 – Upload image
- 6 – Transparent, none, white, black disclaimer block

# Social Media Self Serve



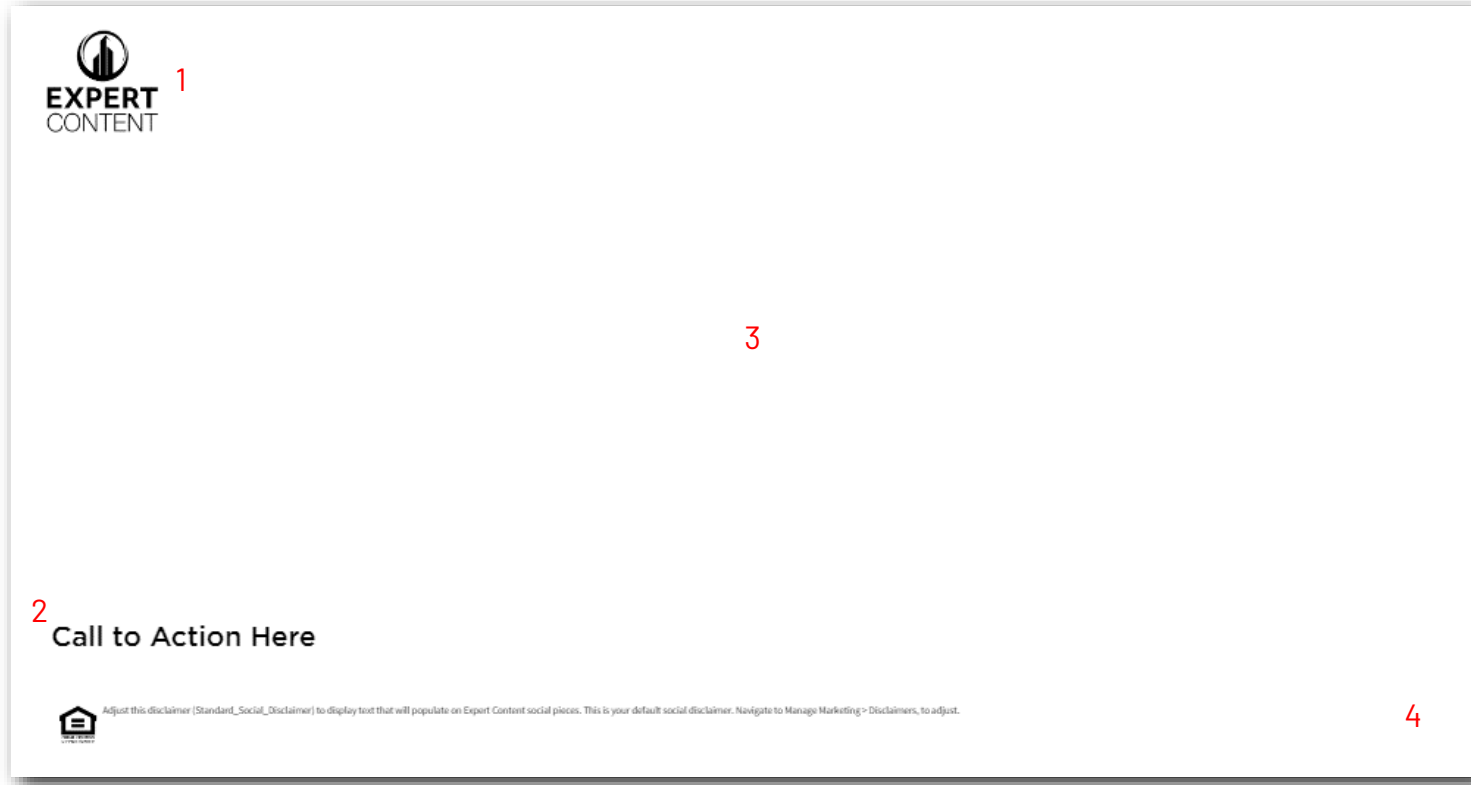
- 1 – Ability to switch logo on/off, adjust logo background color
- 2 – Fully editable CTA
- 3 – Color blocks are brand colors
- 4 – Editable fields
- 5 – Transparent, none, white, black disclaimer block

# Social Media Self Serve



- 1 – Ability to switch logo on/off,
- 2 – Editable CTA/text
- 3 – Upload image
- 4 – Transparent, none, white, black disclaimer block

# Self Serve Social Media



1 – Ability to switch logo on/off, logo positioning

2 – Fully editable CTA

3 – Upload image

4 – Transparent, none, white, black disclaimer block

# Self Serve Social Media

<sup>1</sup> Insert Image Here

1 – Upload image



Email disclosure appears here. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.