



# Disbursements with Zelle®

## Consumer Marketing Guide





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# Disbursements with Zelle®

A guide for companies and governments marketing *Zelle* to consumers

Based on best practices, this guide is designed to provide helpful tips on how and when to deploy consumer facing assets and tactics. Help educate your customers on how to receive money from a company or government entity. Contents:

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# Overview

# Disbursements with Zelle® Toolkit

The Disbursements with *Zelle* toolkit provides key marketing assets and communication resources for companies and government entities who offer *Zelle* as a method to send money to consumers.

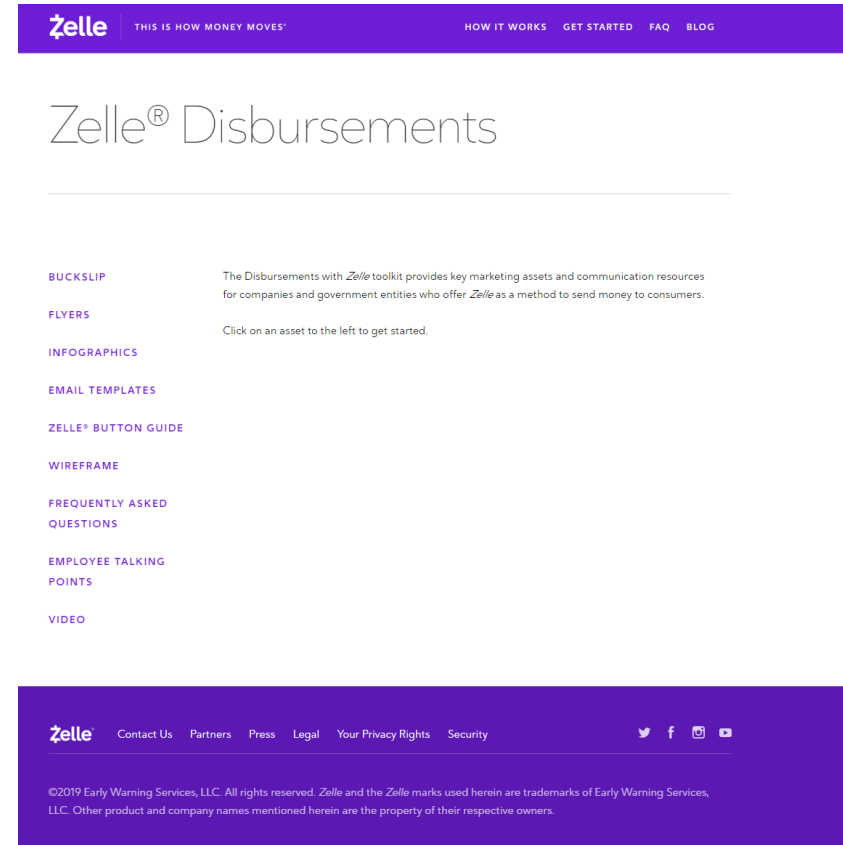
## Benefits of using this toolkit :

- Save time and money on marketing agency fees by utilizing pre-approved *Zelle* assets.
- Educate consumers and promote *Zelle* usage across your customer base.
- Clearly communicate the benefits of *Zelle* as a fast, safe and easy way to receive money.
- Position your organization as a technology leader by leveraging *Zelle* branded assets that are consistent with *Zelle* materials being displayed by banks and credit unions across the country.

WHAT'S INSIDE?

## Disbursements with Zelle® Consumer Marketing Toolkit

- Digital assets (web, infographics, email, Zelle Badge/Button)
- Print assets (buckslips and flyer)
- Video



All materials can be accessed at  
<https://zellepay.com/disbursements-toolkit>



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# Disbursements with Zelle® Toolkit Assets



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# Toolkit Assets

**Get money in the moment.**

Zelle® is a fast, safe and easy way to receive money directly to your bank account, regardless of where you bank¹.

Provide us with your email address or U.S. mobile phone number then enroll that email address or U.S. mobile number with Zelle through your banking app or the Zelle app. Your money will be sent directly to your bank account so you don't have to wait for a check in the mail.

**Enroll today, and the next time we send you money, you'll be sent to receive it faster than a check.**

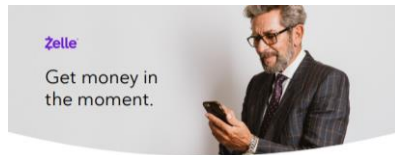
**How do I receive my money?**

**IF YOU HAVE ALREADY ENROLLED WITH ZELLE**  
If you're already using Zelle to send and receive money with friends, just provide us with your email address or U.S. mobile number and we'll send your money directly to your bank account.

**IF YOU HAVE NOT ENROLLED WITH ZELLE**  
Enroll today to receive your money fast!

**Learn more at [zellepay.com](http://zellepay.com).**

¹ Must have a bank account in the U.S. to use Zelle.  
² Disbursement required. Payments can arrive as quickly as minutes or may take up to three business days. Actual times may vary. Zelle and the Zelle-related marks are solely owned by Early Warning Services, LLC, and are used herein under license.



**zelle**  
Get money in the moment.

Receive Your [Reimbursement] from [Company Name] with Zelle®

Zelle is a fast, safe and easy way to receive money directly to your bank account, regardless of where you bank¹. Enroll with Zelle today, and when [Company Name] sends you money, you'll be sent to receive it faster than a check.

If you're already enrolled with Zelle, you don't need to do anything else. You'll receive an email or text message letting you know your payment will be sent to your bank account. If you haven't enrolled with Zelle:

- Visit [enroll.zellepay.com](http://enroll.zellepay.com) to check if your bank or credit union offers Zelle.
- Select your bank or credit union from the list and follow the steps to enroll with Zelle directly through your financial institution.

If your bank isn't listed, no problem! You can still use Zelle by downloading the Zelle app for Android or iOS².

**NOTE TO DISBURSER:** If the consumer needs to take action and opt-in to receive a payment with Zelle through your company, provide those instructions here. For example, "When prompted by [Company Name] to select how you'd like to receive your money, choose Zelle" and provide them with your email address or U.S. mobile number."

To ensure you receive your money from [Company Name], make sure you provide [Company Name] with the same email address or U.S. mobile number you enroll with Zelle.

**ENROLL NOW**

Learn more at [zellepay.com/disbursements](http://zellepay.com/disbursements).



¹ Must have a bank account in the U.S. to use Zelle.  
² If your financial institution doesn't offer Zelle and you're already enrolled in the Zelle app, get your financial institution about your Zelle enrollment time for your bank and Zelle payment can arrive as quickly as minutes or may take up to three business days. Actual times may vary. Zelle and the Zelle-related marks are solely owned by Early Warning Services, LLC, and are used herein under license.

**zelle**  
Get money in the moment.

Zelle® is a fast, safe and easy way to get your money

**Enroll with Zelle today.**

**FAST**  
No need to wait for a check or prepaid card to arrive in the mail, your money will be sent directly to your bank account.

**SAFE**  
Receive money using just an email address or U.S. mobile number.

**EASY**  
If you've never used Zelle®, you can enroll through your banking app or Zelle app to receive your money in just a few simple steps.

**How do I receive my money?**

**IF YOU HAVE ALREADY ENROLLED WITH ZELLE**  
If you're already using Zelle to send and receive money with friends, just provide us with the email address or U.S. mobile number you enrolled with Zelle. Your money will be sent directly to your existing bank account!

**IF YOU HAVE NOT ENROLLED WITH ZELLE**  
Enroll today to receive your money fast!

**Learn more at [zellepay.com](http://zellepay.com).**

¹ Must have a bank account in the U.S. to use Zelle.  
² Disbursement required. Payments can arrive as quickly as minutes or may take up to three business days. Actual times may vary. Zelle and the Zelle-related marks are solely owned by Early Warning Services, LLC, and are used herein under license.

**zelle**  
What is Zelle®?

Zelle is a fast, safe and easy way to get your money electronically, directly to your bank account, regardless of where you bank¹. Provide us with your email address or U.S. mobile phone number, then enroll that email address or mobile phone number with Zelle. Enroll today, and the next time we send you money, you'll get it fast.

**zelle**  
Get money in the moment with Zelle®

Zelle is a fast, safe and easy way to receive money directly to your bank account, regardless of where you bank¹. Enroll today, and the next time we send you money you'll get it fast, directly into your bank account so you don't have to wait for a check to clear.

**FAST**  
No need to wait for a check or prepaid card to arrive in the mail. Your money will be sent directly to your bank account.

**SAFE**  
Receive money using just an email address or U.S. mobile number.

**EASY**  
If you've never used Zelle, you can enroll to receive your money in just a few simple steps.

**What is Zelle?**

- Visit [enroll.zellepay.com](http://enroll.zellepay.com) to check if your financial institution offers Zelle.
- Select your bank or credit union from the list and follow the steps to enroll with Zelle directly through your financial institution.
- If your bank isn't listed, no problem! You can still use Zelle by downloading the Zelle app². To enroll with the Zelle app, enter your bank's contact information, an email address and U.S. mobile number, and a Visa® or Mastercard® debit card with a U.S. based account.
- To ensure you receive your money from us, make sure you have provided us with the same email address or U.S. mobile number you enrolled with Zelle.

¹ Must have a bank account in the U.S. to use Zelle.  
² Disbursement required. Payments can arrive as quickly as minutes or may take up to three business days. Actual times may vary. Zelle and the Zelle-related marks are solely owned by Early Warning Services, LLC, and are used herein under license.

## Infographics

**zelle**  
Receive money safely with Zelle®

**Receive money using just an email address or U.S. mobile number**

**Money moves from bank account to bank account with no steps in between**

**No need to share sensitive account information**

**No checks in the mail to get lost or stolen**

**Use Zelle in your banking app and get the security you trust from your bank or credit union**

¹ Must have a bank account in the U.S. to use Zelle.  
² Disbursement required. Payments can arrive as quickly as minutes or may take up to three business days. Actual times may vary. Zelle and the Zelle-related marks are solely owned by Early Warning Services, LLC, and are used herein under license.

## Flyer

**zelle**  
Consumer FAQs - Disbursements

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## Email

**zelle**  
Disbursements Messaging Guide for Consumers

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## Buckslip

**zelle**  
Receive Your [Reimbursement] from [Company Name] with Zelle®

Zelle is a fast, safe and easy way to get your money electronically

Zelle is a fast, safe and easy way to receive money directly to your bank account. By providing [Company Name] with your email address or U.S. mobile phone number, we can send your money electronically, regardless of where you bank. With Zelle, money is sent directly to your bank account so you don't have to wait for a check in the mail.

**Wireframe**

How it Works

1

Provide us with your email address or U.S. mobile number so we know where to send your payment. No need to share sensitive bank account details with us – we only need your email address or U.S. mobile number to send you money.



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# Assets Overview

All materials can be accessed at <https://zellepay.com/disbursements-toolkit>

| Asset                                  | How to Use                                                                                                                                                                                                                                                                |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ✓ <b>Messaging Guidelines*</b>         | Use this messaging guide to help position Zelle® to your consumers as a fast, safe and easy way to receive money from your organization.<br><br>*Note: this guide can only be obtained from your financial institution. It is not available for download on zellepay.com. |
| ✓ <b>Consumer FAQs - Disbursements</b> | Leverage the consumer facing FAQs on your website or in consumer facing marketing to answer commonly asked questions.                                                                                                                                                     |
| ✓ <b>Talking Points</b>                | Educate your employees, and equip them with talking points to use when communicating with customers about using <i>Zelle</i> to receive money.                                                                                                                            |
| ✓ <b>Wireframe</b>                     | Introduce your customers to <i>Zelle</i> with a landing page designed to educate customers on how to receive money from your organization. Includes design requirements and instruction guide on how to use the wireframe.                                                |
| ✓ <b>Email Templates</b>               | Send emails to your customers encouraging them to pre-enroll and educating them on why <i>Zelle</i> is a fast, safe and easy way to receive money from your organization. See the "emails" page of this guide for additional details.                                     |



## Assets Overview, Continued

| Asset                              | How to Use                                                                                                                                                                                                                                                                                                  |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ✓ <b>Infographics</b>              | Leverage the infographics to introduce Zelle®, explain how to enroll, or educate on why <i>Zelle</i> is a safe way to receive money. The infographics are optimized for digital and are 600 px wide.                                                                                                        |
| ✓ <b>Buckslip/Flyer</b>            | Use the buckslips and flyer to promote awareness of <i>Zelle</i> and encourage your customers to enroll with <i>Zelle</i> . The buckslips are versatile and can be handed out in an office, downloaded from your website, fit conveniently in a standard sized email, can be attached to an email and more! |
| ✓ <b><i>Zelle</i> Badge/Button</b> | Use these guidelines to create a button or badge to encourage your customers to enroll with your organization or opt-in to receive a Disbursement with <i>Zelle</i> .                                                                                                                                       |
| ✓ <b>Video</b>                     | Consumer facing video designed to educate consumers on receiving a disbursement.                                                                                                                                                                                                                            |

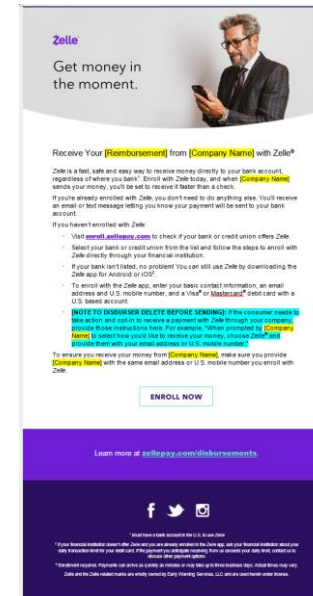


# Emails

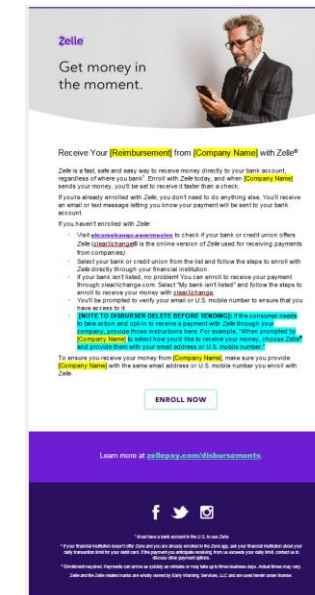
**Pre-enrollment - Zelle® app.** This email template encourages users to pre-enroll with *Zelle*. Leverage this email to increase enrollment with *Zelle* before you send money to your customers. This email directs unenrolled customers to [zellepay.com](https://zellepay.com).

**Pre-enrollment - clearXchange\*.** This email template encourages users to pre-enroll with *Zelle*. Leverage this email to increase enrollment with *Zelle* before you send money to your customers. This email directs unenrolled customers to [clearxchange.com](https://clearxchange.com).

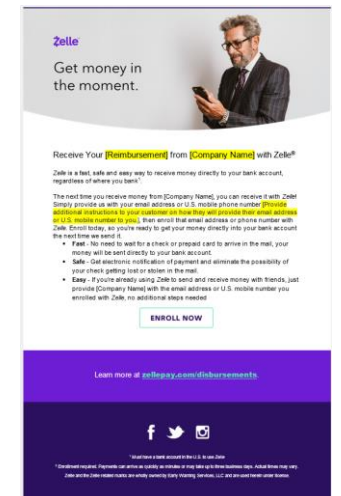
**Awareness.** This email template is an educational email about the benefits of using *Zelle* to receive money from your organization. Leverage this email at any time in your customer journey to increase enrollment with *Zelle*.



Pre-enrollment - *Zelle* app.



Pre-enrollment - *clearXchange*.



Awareness





# Example Timelines and Executions

# Insurance Company

## EXAMPLE USE CASE ONE

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Key Benefit: Educate consumers on receiving their claim with Zelle® - it's faster than a check at the time they need the money most!

- **First.** Deploy a *Zelle* branded landing page to educate your customers. Establish this page first so you can link back to it from other materials. Also, use the badge/button guidelines to create a clear call to action for your customers to digitally opt-in to receive money from your organization.
- **Three weeks prior to product launch.** Educate your employees during a team meeting using the employee talking points.
- **Two weeks prior to product launch.** Print and distribute buckslips and flyers to your front line employees for use with your customers.
- **At product launch.** Leverage the email templates to proactively encourage your customers to enroll with *Zelle*.



# Company Sending Payroll with Zelle®

## EXAMPLE USE CASE TWO

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Key Benefit: Educate consumers on receiving their payroll with Zelle® - it's easy to receive money using an email address or U.S. mobile number!

- **First.** Deploy the *Zelle* branded infographics on your company intranet website. Establish this first so you can link to other materials to drive employee awareness and education.
- **Three weeks prior to product launch.** Deploy the video on your company intranet website to educate employees on the benefits of receiving money with *Zelle*.
- **Two weeks prior to product launch.** Send the pre-enrollment email to your employees encouraging them to enroll with *Zelle* before you send out payroll. Plan to send this at least two weeks prior to launch to give employees time to enroll.
- **One week prior to product launch.** Distribute the flyer to your employees in the office to encourage enrollment prior to launch.





# Creating Your Own Marketing Collateral

# Brand Reviews

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- **No trademark license has been granted to your corporate or government entity.** Changes to these materials beyond the indicated fields are not permitted. Please review the Terms of Use prior to printing and/or distribution.
- All custom Zelle® collateral is subject to Brand Review by Early Warning (network operator of *Zelle*).
- Work with your Financial Institution to secure approval from Early Warning Services, LLC on any custom collateral or modifications to these templated materials that mention *Zelle*.
- Early Warning's Brand Review SLA is 10-business days. Your financial institution may ask for additional time to facilitate reviews.
- Approvals are valid for 12 months from the date of approval.





# Questions?

Contact your financial institution.

Learn more about how Zelle® works by visiting [zellepay.com](https://zellepay.com)



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# zelle

THIS IS HOW MONEY MOVES®