

# HTML-emailRESOURCEguide

---

## GENERAL WORKING TOOLS

Quality Check List	2
Validate code -Validator.w3.org	3
Litmus testing	4
Create an ICAL in Outlook	5
Image server storage	6

## HTML DESIGN SYSTEMS -XD MOCKS - BASE HTML -LOCATION

Ivy Institute	7-8
Ivy Live	8-9
Sporting KC	-
GenLink	-
Monthly Insights	-
Event Invites	-
Webinars	-
Conference Calls	-

## HTML STANDARDS

Headers / buttons	11
Logo size	-

## CODE SNIPPETS LIBRARY

Buttons	-
2/3/4 speakers w photo	-
Disclosures	-
Bullets	-
2/3 column block	-
Unsubscribe	-

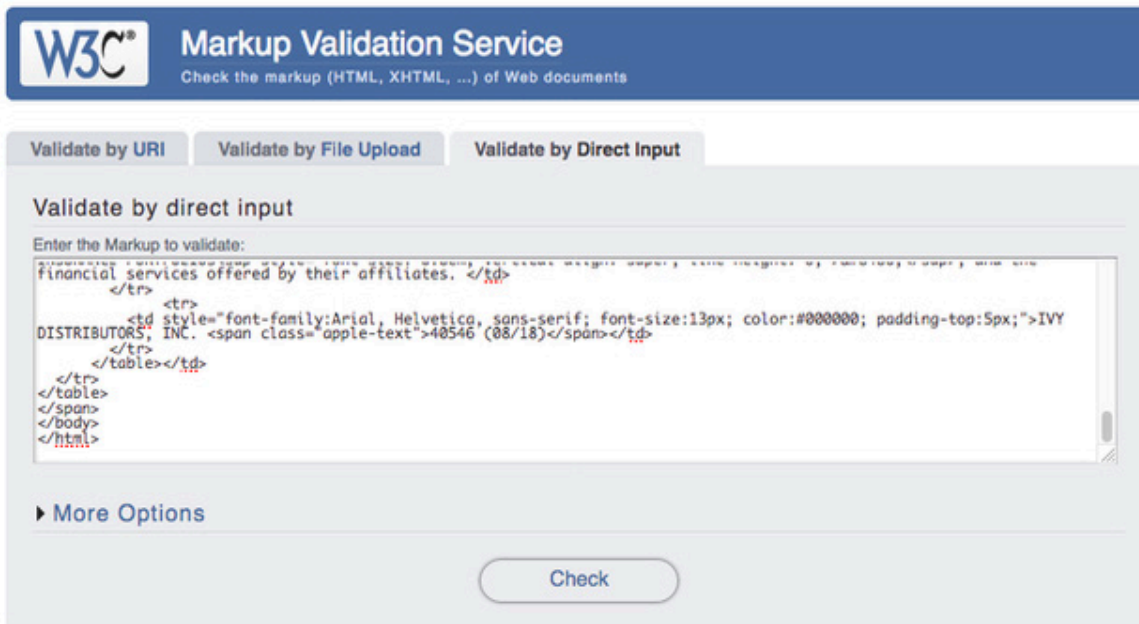
# QUALITY CHECK LIST

- **Title and preheader text**
  - **Title = headline or subject line**
  - **preheader = can use first sentence from body copy (between 85-100 characters)**
- **Text links / numbers / dates**
  - `<span class="apple-text">Quarterly 529 plan </span>`
- **Update links**
  - **alt and title tags**
- **New image/s**
  - **alt and title tags**
  - **absolute links - Pardot**
- **Styles**
  - **inline css and mobile responsive**
- **Buttons**
  - **update link/s**

## TESTING

- **Validator and Litmus**

1. click on the tab [Validate by Direct Input] copy/paste HTML in field and select “Check”



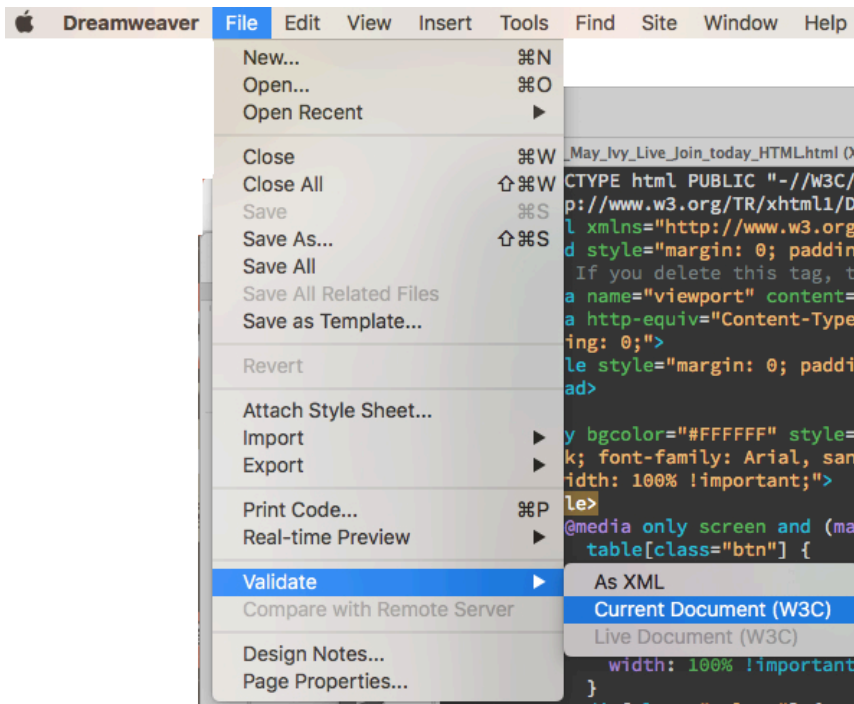
Here are common errors that are NOT an issue

```
<table align="center" width="100%" border="0" cellspacing="0" cellpadding="0">
```

The mentioned element is not allowed to appear in the context in which you've placed it; the other mentioned elements are the only ones that are both allowed there and can contain the element mentioned. This might mean that you need a containing element, or possibly that you've forgotten to close a previous element.

One possible cause for this message is that you have attempted to put a block-level element (such as "<p>" or "<table>") inside an inline element (such as "<a>", "<span>", or "<font>").

Here is how to use the validator within DW 2019.



1. There are only so many user seats. If you don't have one please have another team member help test.

Quick Start
View options ▾

Build, test, and get instant previews in 90+ clients as you troubleshoot

Paste your HTML

Send us your email to get instant previews and run a comprehensive checklist

Send your email

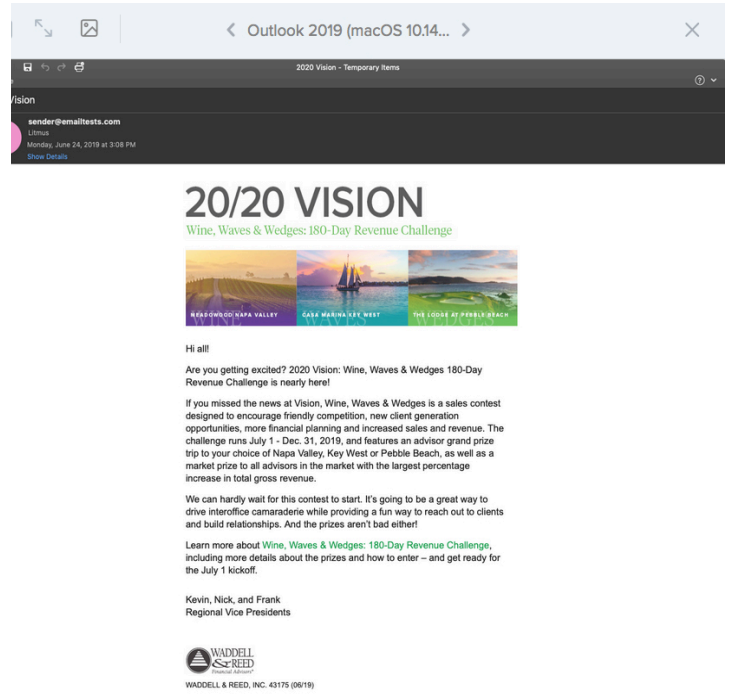
Get subscriber-level insights to improve segmentation and targeting strategies

New tracking code

Test in 20+ spam filters and make sure your email makes it to the inbox every time

Run a spam test

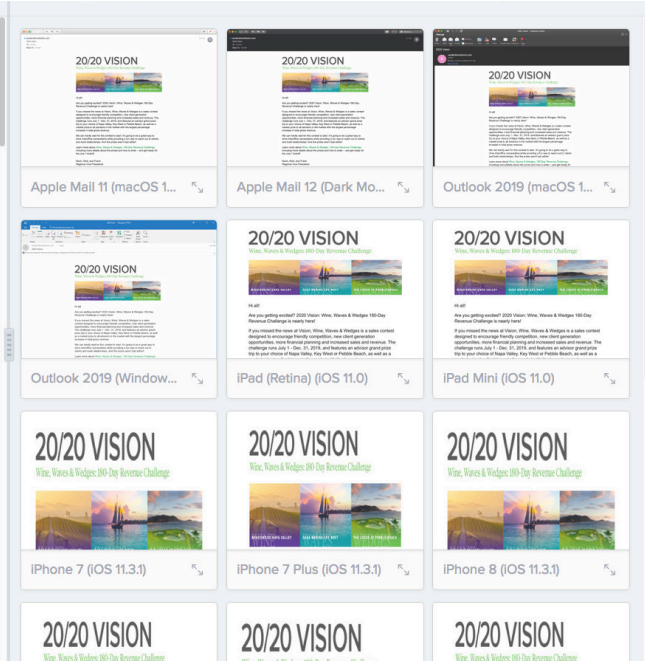
💬



```

1 <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
2 "http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
3 <html xmlns="http://www.w3.org/1999/xhtml">
4 <head>
5 <meta name="viewport" content="initial-scale=1, maximum-
6 scale=1" />
7 <meta http-equiv="Content-Type" content="text/html;
8 charset=UTF-8" />
9 <title>20/20 Vision - Wine, Waves, & Wedges: 180-Day
10 Revenue Challenge</title>
11 <style type="text/css">
12 body {
13 padding: 0px !important;
14 margin: 0px !important;
15 width: 100% !important;
16 -webkit-text-size-adjust: 100% !important;
17 -ms-text-size-adjust: 100% !important;
18 }
19 img {
20 outline: none;
21 text-decoration: none;
22 -ms-interpolation-mode: bicubic;
23 }
24 .apple-gray {
25 color: #53565A;
26 text-decoration: none;
27 }
28 .apple-gray a {
29 color: #53565A;
30 text-decoration: none;
31 }
32 .apple-text {
33 color: #000000;
34 text-decoration: none;
35 }
36 .apple-text a {
37 color: #000000;
38 text-decoration: none;
39 }

```



## CREATE AN ICAL (.ics) IN OUTLOOK

1. From the Outlook drop down menu click New - Appointment
2. Enter event details ie. subject, location, date, start time/end time (time zone if applicable), content.
3. Click "Save & Close"
4. Highlight appointment within your Outlook calendar and drag to your desktop
5. Right click on .ics file on open with TextEdit, update organizer information from your name@waddell.com to marketing@ivyinvestments.com (or email address provided)

```
SUMMARY:Ivy Live: Tech to tanks: The impact of increased defense spending
DESCRIPTION:\n\nTech to tanks: The impact of increased defense
spending\n\n\n\nThe threat of global terrorism and a hard-line stance
on homeland security by a new administration means more spending on
defense and intelligence services. Does this improve the outlook for
companies providing everything from technology and consulting services
to military equipment?\n\n\n\nJoin our live webcast as members of the
Ivy team discuss notable industry trends to consider when building your
clients' portfolios.\n\n\n\nOn the day of the event click on the link
below 15 minutes prior to register or log in to
Livestream.\n\n\n\nhttps://www.ivyinvestments.com/ivy-live\n\n\nThis is a web
based event with audio through your speakers. \n\n\nA replay will be
available 1 business day following the live event on
https://www.ivyinvestments.com/ivy-live\n
LOCATION:Webcast link Below
ORGANIZER:MAILTO:slindquist@waddell.com
SEQUENCE:0
X-MICROSOFT-CDO-BUSYSTATUS:BUSY
X-MICROSOFT-CDO-ALLDAYEVENT:FALSE
X-MICROSOFT-CDO-INSTTYPE:0
BEGIN:VALARM
```

6. Rename .ics to exclude spaces and special characters (ie. numbers, symbols)
7. Upload .ics to Cyberduck - copy .ics file to project folder and copy/paste absolute link into HTML code.

# IMAGE SERVER STORAGE - PARDOT

Please point image to the project folder with “FPO” while working on task. Once HTML is approved with chosen image, please email Stephanie or Danielle to upload into Pardot. You will then be provided a URL for those absolute image paths. Make sure all other images or logos point to Pardot’s server. (“https://www2.ivyinvestments.com”)

## Reference this document for image paths of speakers or employee photos sized 90x90

Team Transfer Folders/Stephanie\_transfer/DesignHTML\_system/Pardot/Pardot - image - paths.xlsx



## Reference this document for logos and social media icons image paths

Team Transfer Folders/Stephanie\_transfer/DesignHTML\_system/CyberDuck to Pardot image paths/Email Images

Moved to Pardot.docx





## LinkedIn for Lead Generation and Networking

Good for you, you've completed your LinkedIn profile. But are you taking full advantage of the social network to build your business?

If you want to connect to more of your ideal customers and centers of influence, join us for our next webcast where Phil Gerbyshak will reveal how you can leverage LinkedIn for high-quality lead generation and extend your network.



Phil Gerbyshak  
Sales Trainer  
and LinkedIn Expert

**WEBCAST**  
Friday, July 12, 2019  
10:00 – 10:30 a.m. CT

[REGISTER NOW](#)

**Scheduling conflict?**  
Register for the webcast and we'll send you the replay after the event.



**FOR INVESTMENT PROFESSIONAL USE ONLY. NOT FOR USE WITH THE GENERAL PUBLIC.**  
Not all of the suggestions provided may be appropriate for your business model nor approved by your compliance department. Prior to acting, it is up to you, the advisor, to ensure you are following your firm's social media policy regarding the proper usage of any social media platform.

The data, analyses and opinions contained in the presentation are those of the speaker, is for informational purposes only, and is not meant as investment advice or a recommendation to engage in any investment strategy.

Ivy Distributors, Inc. is not related to or affiliated with the mentioned speaker. Ivy Distributors, Inc. does not guarantee the completeness or accuracy of the information and has taken no part in producing the material.

Ivy INVESTMENTS™ refers to the investment management and investment advisory services offered by Ivy Investment Management Company, the financial services offered by Ivy Distributors, Inc., a FINRA member broker dealer and the distributor of IVY FUNDS™ mutual funds and IVY VARIABLE INSURANCE PORTFOLIOS®, and the financial services offered by their affiliates.

IVY DISTRIBUTORS, INC. 43067 (06/19)

This email was sent by:



Ivy Distributors, Inc.  
6300 Lamar Avenue  
Overland Park, KS 66212

We respect your right to privacy - [View Our Policy Update Email Preferences](#)



## LinkedIn for Lead Generation and Networking

Join our next webcast to hear tips on leveraging LinkedIn for high-quality lead generation and extending your network.

Here's more information about our speaker, Phil Gerbyshak:

- Phil is a sales trainer and LinkedIn expert who teaches how to integrate technology, maximize time and build blocks of business.
- Over the last 10 years he has utilized his experience as a registered representative to train and coach financial advisors.
- Phil's work has been featured in the Wall Street Journal, USA Today, Forbes, Fortune and more.



Phil Gerbyshak  
Sales Trainer  
and LinkedIn Expert

**WEBCAST**  
Friday, July 12, 2019  
10:00 – 10:30 a.m. CT

[REGISTER NOW](#)

**Scheduling conflict?**  
Register for the webcast and we'll send you the replay after the event.



**FOR INVESTMENT PROFESSIONAL USE ONLY. NOT FOR USE WITH THE GENERAL PUBLIC.**  
Not all of the suggestions provided may be appropriate for your business model nor approved by your compliance department. Prior to acting, it is up to you, the advisor, to ensure you are following your firm's social media policy regarding the proper usage of any social media platform.

The data, analyses and opinions contained in the presentation are those of the speaker, is for informational purposes only, and is not meant as investment advice or a recommendation to engage in any investment strategy.

Ivy Distributors, Inc. is not related to or affiliated with the mentioned speaker. Ivy Distributors, Inc. does not guarantee the completeness or accuracy of the information and has taken no part in producing the material.

Ivy INVESTMENTS™ refers to the investment management and investment advisory services offered by Ivy Investment Management Company, the financial services offered by Ivy Distributors, Inc., a FINRA member broker dealer and the distributor of IVY FUNDS™ mutual funds and IVY VARIABLE INSURANCE PORTFOLIOS®, and the financial services offered by their affiliates.



## LinkedIn for Lead Generation and Networking

Discover how to generate leads and create networking opportunities on LinkedIn.

**Today**  
10:00 – 10:30 a.m. CT

[REGISTER NOW](#)

**Scheduling conflict?**  
Register for the webcast and we'll send you the replay after the event.



**FOR INVESTMENT PROFESSIONAL USE ONLY. NOT FOR USE WITH THE GENERAL PUBLIC.**  
The data, analyses and opinions contained in the presentation are those of the speaker, is for informational purposes only, and is not meant as investment advice or a recommendation to engage in any investment strategy.

Not all of the suggestions in the presentation may be appropriate for your business model nor approved by your compliance department. Prior to acting, it is up to you, the advisor, to ensure you are following your firm's email policy regarding the proper usage of all emails.

Ivy Distributors, Inc. is not related to or affiliated with the mentioned speaker. Ivy Distributors, Inc. does not guarantee the completeness or accuracy of the information and has taken no part in producing the material.

Ivy INVESTMENTS™ refers to the investment management and investment advisory services offered by Ivy Investment Management Company, the financial services offered by Ivy Distributors, Inc., a FINRA member broker dealer and the distributor of IVY FUNDS™ mutual funds and IVY VARIABLE INSURANCE PORTFOLIOS®, and the financial services offered by their affiliates.



We respect your right to privacy - [View Our Policy Update Email Preferences](#)



## LinkedIn for Lead Generation and Networking

Discover how to generate leads and create networking opportunities on LinkedIn.

**Today**  
10:00 – 10:30 a.m. CT

[JOIN NOW](#)



**FOR INVESTMENT PROFESSIONAL USE ONLY. NOT FOR USE WITH THE GENERAL PUBLIC.**  
The data, analyses and opinions contained in the presentation are those of the speaker, is for informational purposes only, and is not meant as investment advice or a recommendation to engage in any investment strategy.

Not all of the suggestions in the presentation may be appropriate for your business model nor approved by your compliance department. Prior to acting, it is up to you, the advisor, to ensure you are following your firm's email policy regarding the proper usage of all emails.

Ivy Distributors, Inc. is not related to or affiliated with the mentioned speaker. Ivy Distributors, Inc. does not guarantee the completeness or accuracy of the information and has taken no part in producing the material.

Ivy INVESTMENTS™ refers to the investment management and investment advisory services offered by Ivy Investment Management Company, the financial services offered by Ivy Distributors, Inc., a FINRA member broker dealer and the distributor of IVY FUNDS™ mutual funds and IVY VARIABLE INSURANCE PORTFOLIOS®, and the financial services offered by their affiliates.

IVY DISTRIBUTORS, INC. 43071 (06/19)

This email was sent by:



Ivy Distributors, Inc.  
6300 Lamar Avenue  
Overland Park, KS 66212

We respect your right to privacy - [View Our Policy Update Email Preferences](#)



## LinkedIn for Lead Generation and Networking

Thanks for registering for the Ivy Institute's webcast "LinkedIn for Lead Generation and Networking." You can access the replay [here](#).

During the webcast, Phil Gerbyshak discussed:

- How to build a valuable LinkedIn profile
- Tips for connecting with virtually anyone
- How to stay compliant while still sharing your personality

**WEBCAST**  
Upcoming Webcast

We invite you to register for our August webcast "What's New in Retirement Plans."



**FOR INVESTMENT PROFESSIONAL USE ONLY. NOT FOR USE WITH THE GENERAL PUBLIC.**  
The data, analyses and opinions contained in the presentation are those of the speaker, is for informational purposes only, and is not meant as investment advice or a recommendation to engage in any investment strategy.

Not all of the suggestions in the presentation may be appropriate for your business model nor approved by your compliance department. Prior to acting, it is up to you, the advisor, to ensure you are following your firm's email policy regarding the proper usage of all emails.

Ivy Distributors, Inc. is not related to or affiliated with the mentioned speaker. Ivy Distributors, Inc. does not guarantee the completeness or accuracy of the information and has taken no part in producing the material.

Ivy INVESTMENTS™ refers to the investment management and investment advisory services offered by Ivy Investment Management Company, the financial services offered by Ivy Distributors, Inc., a FINRA member broker dealer and the distributor of IVY FUNDS™ mutual funds and IVY VARIABLE INSURANCE PORTFOLIOS®, and the financial services offered by their affiliates.

IVY DISTRIBUTORS, INC. 43072 (07/19)

This email was sent by:



Ivy Distributors, Inc.  
6300 Lamar Avenue  
Overland Park, KS 66212

We respect your right to privacy - [View Our Policy Update Email Preferences](#)

- HTML 1  
Topic driven
- HTML 2  
Speaker driven
- HTML 3  
Haven't registered
- HTML 4  
Starting soon
- HTML 5  
Sorry/ Thanks Registered

Template location:  
DESIGN TEAM/.....

### Ivy Live HTML 1

### Ivy Live HTML 2

### Ivy Live Join Today

### Ivy Live Join Now

### Ivy Live Replay

HTML 1  
?  
HTML 2  
?  
HTML 3  
?  
HTML 4  
?  
HTML 5  
?



# HTML STANDARDS

## Headers

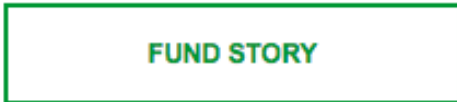


**IVY'S TOP fi360 QUARTILE SCORES**

AS OF MARCH 31, 2019



## Buttons



## Logos



126px x 52px

---

### Template location:

/DESIGN TEAM/Team Transfer Folders/Stephanie\_transfer/\_CodeSnippets