***NOTICE****: The following has been provided by WBA committee and section volunteers for use by member banks.   
It should be reviewed and revised as appropriate to the user-bank’s own policies, procedures, and practices.*

**Marketing Project Sheet Checklist**

A marketing project sheet should be customized to your bank’s needs and regulations. When creating a project sheet for your marketing department, be sure to read through this checklist to ensure you have the following sections listed in addition to your bank’s guidelines.

All items should be answered either “Yes” or “N/A.” Any answered “No” must receive further attention.

|  | **Yes** | **No** | **N/A** |
| --- | --- | --- | --- |
| **General Requirements** | | | |
| Date Requested |  |  |  |
| Date Due |  |  |  |
| Priority Level *(low, medium, or high)* |  |  |  |
| **Project Information** | | | |
| Project Name |  |  |  |
| Requested By |  |  |  |
| Project Type *(letter, flyer/poster, print ad, online/web-related, event, and/or other)* |  |  |  |
| Project Goal |  |  |  |
| Target Market |  |  |  |
| Bank Area *(retail, mortgage, investments, business services, business banking, human resources, bank wide, shareholders, and/or operations)* |  |  |  |
| Project Description |  |  |  |
| **Completed By Marketing** | | | |
| Estimated Costs |  |  |  |
| Time Estimate |  |  |  |
| Expected Benefit(s) |  |  |  |
| Creative Implementation *(100% internal, mix of internal and external, and/or 100% external) (list any external parties involved)* |  |  |  |
| Requires *(new creative development, media buying, external printing, internal printing, target list purchase, direct mail, news release, and/or website updates)* |  |  |  |
| Placement |  |  |  |
| Start/End Date |  |  |  |
| **Completed By Compliance** | | | |
| Does the project contain “Member FDIC”? |  |  |  |
| Does the project contain the Equal Housing Lender logo? |  |  |  |
| Does the project include a lending rate disclosure? |  |  |  |
| Does the project include a deposit rate disclosure? |  |  |  |
| Does the project contain bonus or term disclosures? *(balance to open, balance to obtain, when paid, when available, and/or interest bearing)* |  |  |  |
| **Final Approval Signatures and Dates** | | | |
| Senior Management |  |  |  |
| Compliance Officer |  |  |  |
| Marketing Supervisor |  |  |  |
| **For Internal Use Only** | | | |
| Actual Time |  |  |  |
| Actual Cost |  |  |  |
| Additional Comments |  |  |  |