

# THE MARKETING MIX

January 2025

# 3

Seasonal themes  
& topics to help

**AMPLIFY YOUR  
MARKETING  
RESULTS**

*Look inside for more tips!*

**Cold to Gold Framework | Social Media Prompts | Suggested Calendar | and More!**

# SEASONAL TOPICS

**Struggling with creating informative and timely communications?** Here are suggested seasonal topics. Creating content around these themes will lead to higher engagement with your audience due to their timeliness!

**No time to create your own content?** No problem, check out our suggested ready-to-go campaigns on Page 4.



**Financial Wellness Month**



**Market Outlook for the New Year**



**Retirement Planning Reset**

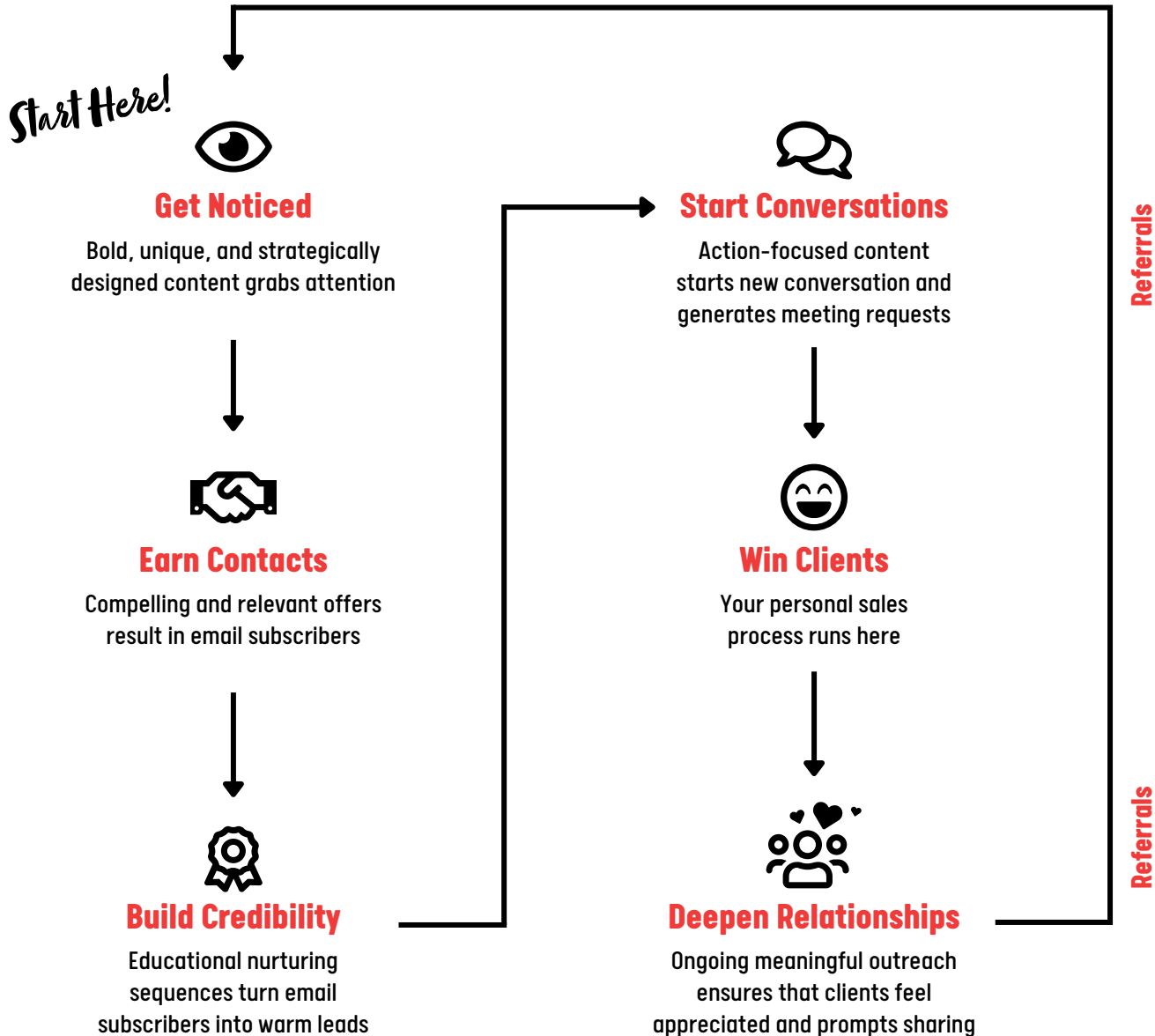
# Achieve better results with a **COMPLETE STRATEGY**

*The Cold to Gold framework*

The **Cold to Gold Framework** is our proven strategy to help you take your prospects and turn them into clients.

The campaigns in this Marketing Mix fit into various positions within the framework to help you create a robust marketing experience for your clients and prospects.

Match up the icons below to the campaigns within the mix!



# 4 CAMPAIGNS

to *jumpstart* the month

With such robust content to sift through every month, we'd like to give you our top picks. You can launch these on your own or with us in a Launch It! Marketing Mix Session.

[Register here](#)

COLD TO GOLD

*Just a little reminder :)*



**Get Noticed**



**Earn Contacts**



**Build Credibility**



**Start Conversations**



**Win Clients**



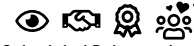
**Deepen Relationships**



**90 Day New Client Onboarding**  
New Client Onboarding Campaign



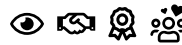
**Q4 2024 Quarterly Financial Update**  
Quarterly Financial Update



Scheduled Release: Jan 10



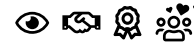
**The Retiree's Time Machine: Lessons from Your Future Self**  
Visual Insights Newsletter



OR



**Fresh Start**  
Visual Insights Newsletter



**Timely Emails**

Launch as soon as possible



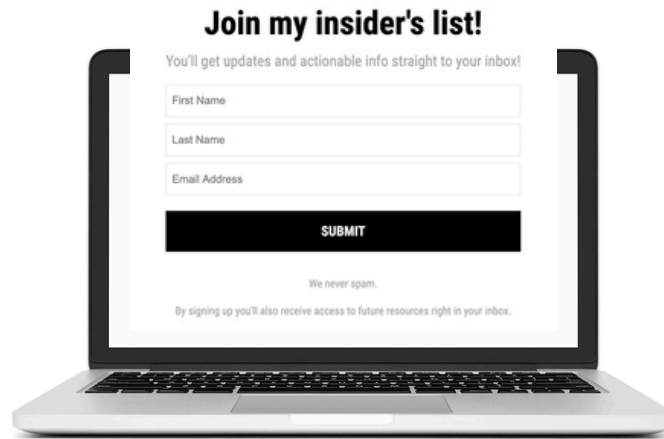
# Let's start with the ESSENTIALS

Set yourself up for success by making sure you've launched these campaigns. Consider these campaigns your bread and butter when it comes to your marketing.

## 90-Day New Client Onboarding



## Website Opt-in Form



## 8-Week Prospect Nurturing Campaign (with or without video)



## Coming Soon!

You won't want to miss these dropping in the following weeks.



**Hidden Tax Opportunities**  
Lead Generation Campaign



**5 Key Questions to Test Retirement Knowledge**  
Visual Insights Newsletter



**Q4 2024 Quarterly Financial Update**  
Quarterly Financial Update



**Client NPS & Referral**  
Client Retention Campaign

# GET SOCIAL!

Marketing doesn't start and end with automation. Personal posts are still critical to building those connections.

**To do:** Fill in the blanks to help you get started with a social media post. Post alongside a picture of your office, a selfie of you in your favorite spot, or an image that invokes inspiration (think sunset, beach, etc.)

## Social Media Prompt of the Month:

### Post on New Year's Day - January 1

Happy New Year! 2025 is here, and it's the perfect time to set your financial goals in motion. Start by taking a fresh look at your budget—trim unnecessary expenses and prioritize opportunities to grow your wealth. Need help mapping it out? Let's connect and make this your best financial year yet!



### Post on Martin Luther King Jr. Day - January 20

'The time is always right to do what is right.' - Martin Luther King Jr. Let's celebrate his legacy by coming together as a community to create positive change. Every act of kindness makes an impact. What will you do to make a difference today?



## Post Pairings

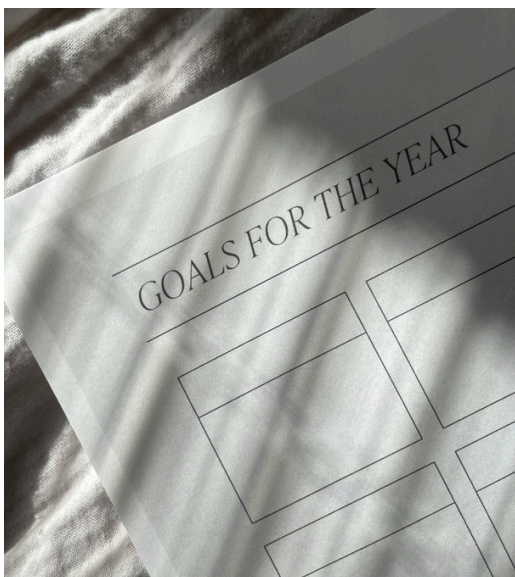
Find an accompanying stock image or personal photo to go along with these social post ideas!

Want to level-up? Drop a video and send a personal message instead.

- World Day of Peace - Jan 1
- World Braille Day - Jan 4
- National Retirement Planning Week (mid-January)
- International Day of Education - Jan 24
- Chinese New Year - Jan 29

# GATHER 'ROUND

Check out these ideas and use our **Event Planning Checklist** in the library to help plan your next event.



## **New Year's Vision Board Party**

Kick off the year by helping clients set meaningful goals with a vision board workshop. Provide supplies and guidance as attendees create visual representations of their personal and financial aspirations.

Incorporate light refreshments and casual networking to make it a relaxed, inspiring event. This hands-on activity fosters creativity, sparks goal-oriented conversations, and strengthens connections with your clients.

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## **Financial Movie Night**

Engage clients and their families with a fun, educational movie night featuring a film like *The Pursuit of Happyness* or *Moneyball*.

Pair the screening with light refreshments and a brief discussion to connect the story to real-life financial lessons. It's a unique way to build relationships while showcasing your expertise.



# JANUARY MARKETING CALENDAR

See when each of your emails + social posts are scheduled on your Marketing Hub Calendar!\*

Monday	Tuesday	Wednesday	Thursday	Friday
		1	2	3
6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28	29	30	31

\*Marketing Hub availability on enterprise platforms is dependent on enterprise approval.