

— A P R I L 2 0 2 6 —

MARKETING PLAN

3

Seasonal themes
& topics to help

**AMPLIFY YOUR
MARKETING
PLAN RESULTS**

Look Inside for More Tips!

Lead Lifecycle

Social Media Prompts

Client Event Ideas

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.

1

Financial Literacy Month



2

First Quarter Financial Check-In



3

National Retirement Planning Month



COMPLETE STRATEGY

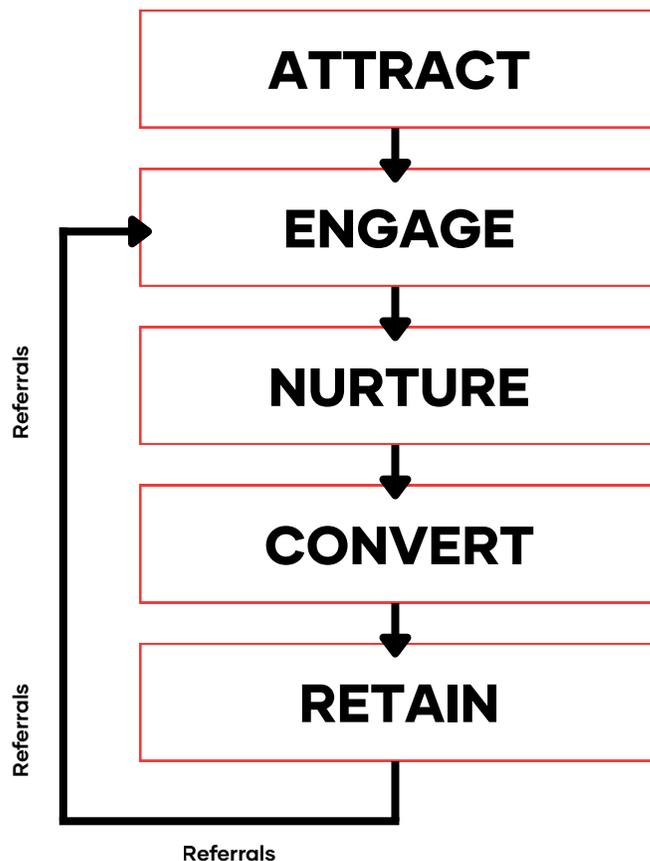
THE LEAD LIFECYCLE

The Lead Lifecycle is the step-by-step journey from cold to client.

Advisors are great at building relationships in “the real world.” But the digital world is more complex. It’s easy to skip steps or get this wrong.

The Lead Lifecycle will help you guide your audience through early trust-building stages, and later conversion stages.

Every piece of content in your marketing plan is built on this strategic approach.



CAMPAIGNS

Jumpstart the month with these 6 campaigns!

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](#)

Core Audience Segments:



Clients



All Prospects



Cold Prospects



Warm Prospects



Hot Prospects



Gold Prospects

HIGH EARNING PROFESSIONALS

Prospect Engagement Campaign



THE THREE CHAPTERS OF RETIREMENT

Visual Insights Newsletter



PLANTING FRESH HABITS THIS SPRING

Visual Insights Newsletter



TIMELY EMAILS

Launch ASAP



WHAT IS A RMD & WHEN DO THEY START?

Personal Connection Video



NATIONAL FINANCIAL LITERACY MONTH

Holiday Email



Disclaimer: Content availability on enterprise platforms is dependent on enterprise approval.

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.

1



90-Day New Client Onboarding

Coming Soon!

You won't want to miss these dropping soon.



LIVING INHERITANCE

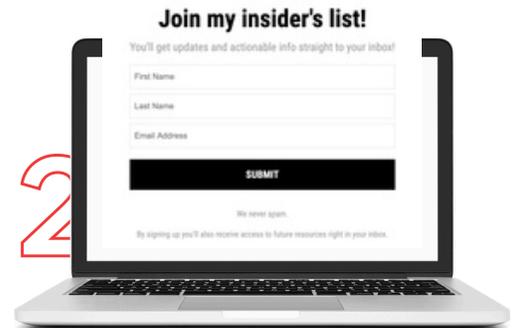
Personal Connection Video



Q1 2026 QUARTERLY FINANCIAL UPDATE

Quarterly Financial Update

2



Website Opt-in Form



EASTER

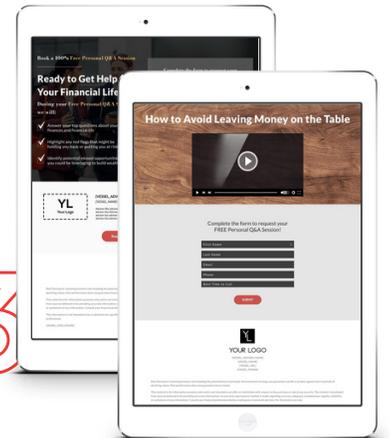
Holiday Email



TIME, DISCIPLINE, AND THE LONG GAME

Visual Insights Newsletter

3



8-Week Prospect Nurturing Campaign

(with or without video)

GET SOCIAL

Post this any time in April

April is Stress Awareness Month — and money stress is real.

A clear financial plan can bring confidence and peace of mind. I recharge by [favorite way to destress] — how do you reset?

If finances are weighing on you, let's talk.

SOCIAL MEDIA PROMPTS OF THE MONTH:

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.)

Tax Day is here ✓

If filing felt stressful, proactive planning can make next year easier — and potentially help you keep more of what you earn.

Want to get ahead of it now? I'm here to help.

 [link]

Post this on Tax Day - 04/15

Wishing you and your loved ones a joyful and peaceful Easter. 🌸

Spring is a season of renewal — a fresh start, new goals, and time well spent with the people who matter most.

I'm grateful for the relationships I get to build with clients and our community every day. However you're celebrating, I hope the day brings you rest, connection, and a little sunshine.

Happy Easter!

Post this on Easter Monday - 04/06

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.

Apr 1
April Fools Day

Apr 3
Good Friday

Apr 6
Easter Monday

Apr 1-9
Passover

Apr 15
Tax Day

Apr 22
Earth Day

EVENT PLANNING

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



FINANCIAL WELLNESS BINGO

Host a Financial Wellness Bingo Challenge featuring real-life money milestones like reviewing a credit report, boosting retirement contributions, or building an emergency fund.

Clients mark squares as they complete actions during workshops, webinars, or advisor meetings. Add prizes for bingo lines, blackouts, or leaderboard leaders to drive participation.

An engaging way to spark smart money habits and meaningful conversations.

Best for: Financial Literacy Month, client events, prospect engagement



RETIREMENT PLANNING PICNIC

Host a relaxed outdoor Retirement Planning Picnic that blends connection with practical guidance on income planning and long-term confidence.

Include a Retirement Bucket List activity where clients map their dream experiences and learn how a thoughtful plan can help make them happen.

Low-pressure, high-value, and built for stronger relationships.

Best for: Pre-retirees, client appreciation, referral events

APRIL

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	