

F E B R U A R Y 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

**Tax
Season
Prep**



2

**Black
History
Month**



3

**Financial Aid
Awareness
Month**



COMPLETE STRATEGY

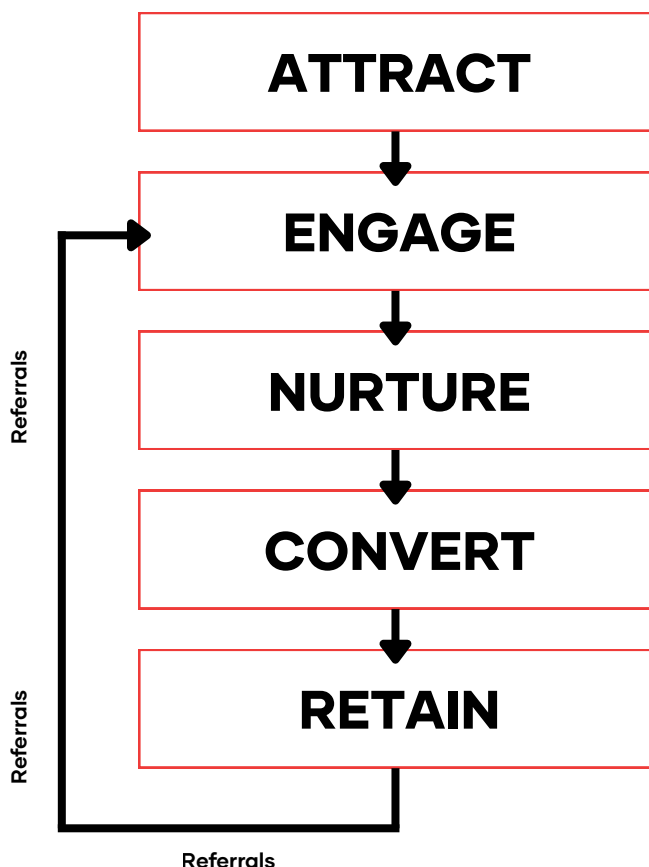
THE LEAD LIFECYCLE

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

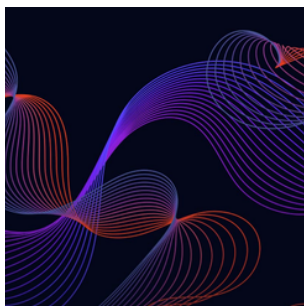
HIDDEN TAX OPPORTUNITIES

Lead Generation Campaign



LIFE'S FINANCIAL TURNING POINTS

Visual Insights Newsletter



HOW FEAR AND GREED KILL RETURNS

Visual Insights Newsletter



OR

TIMELY EMAILS

Launch ASAP



VALENTINE'S DAY & BLACK HISTORY MONTH

Holiday Emails



FINANCIAL AID AWARENESS 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.

Coming Soon!

You won't want to miss these dropping soon.



WHEN IS IT TIME TO HIRE A FINANCIAL ADVISOR?

Personal Connection Video



RETIREMENT INCOME ESSENTIALS

Prospect Engagement Campaign



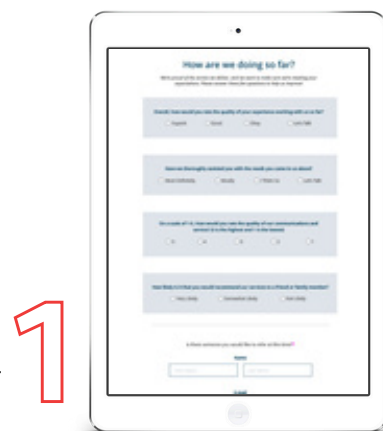
FIRST-YEAR RMD DEADLINE

Single Email



TAX LITERACY QUIZ

Visual Insights Newsletter



90-Day New Client Onboarding



Website Opt-in Form



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

GET SOCIAL

Post this for
Financial Aid
Awareness -
early-mid
February

February is Financial Aid Awareness Month! 🎓

Families often underestimate how planning ahead can save thousands in tuition.

If you're thinking about college funding, now's the perfect time to review your strategy and maximize your options.

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.)

Strong partnerships are built on trust, care, and follow-through.

This Valentine's Day, I'm reminded how much those same qualities matter in guiding clients toward their financial goals.

How do you show love and care in the relationships that matter most?

Post this on
Valentine's
Day - 02/14

Presidents' Day reminds me that leadership isn't just about titles, it's about the impact we have on others.

In my work helping clients navigate their financial goals, I strive to demonstrate [trustworthiness, clarity, empathy].

What leadership qualities do you value most in your advisor?

Post this on
President's
Day - 02/16

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.

Feb 2
Groundhog Day

Feb 4
World Cancer Day

Feb 8
Super Bowl Sunday

Feb 11
International Day of
Women and Girls in
Science

Feb 12
Abraham Lincoln's
Birthday

Feb 17
Random Acts of
Kindness Day

Feb 25
Pink Shirt Day

EVENT PLANNING

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



LOVE & MONEY: FINANCIAL PLANNING FOR COUPLES

Make Valentine's Day meaningful with a "Love & Money" event for couples.

Cover the essentials—budgeting, shared goals, and estate planning—while creating space for relaxed conversation and connection.

With a take-home Couple's Financial Checklist, light refreshments, and casual networking, couples will walk away aligned, informed, and ready to plan their future together.



TAX PREP & PLANNING WORKSHOP

Take the stress out of tax season with a "Tax Prep & Planning" workshop designed to make taxes feel more manageable.

Clients will learn how to organize their paperwork, uncover potential deductions, and plan ahead to minimize their tax bill.

Bring in a CPA to answer questions and share expert tips, and host the session in early to mid-February—right when clients need it most. Attendees leave feeling informed, prepared, and ready to tackle tax season.

FEBRUARY

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

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

2

3

4

5

6

9

10

11

12

13

16

17

18

19

20

23

24

25

26

27