

JANUARY 2026

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?

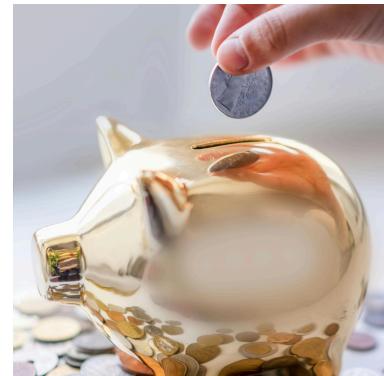
Here are suggested seasonal topics. Creating content around these themes will lead to higher engagement with your audience due to their timeliness!

No time to create your own content?

No problem, check out our suggested ready-to-go campaigns on Page 4.

1

Financial Wellness Month



2

Market Outlook for the New Year



3

National Mentoring Month



COMPLETE STRATEGY

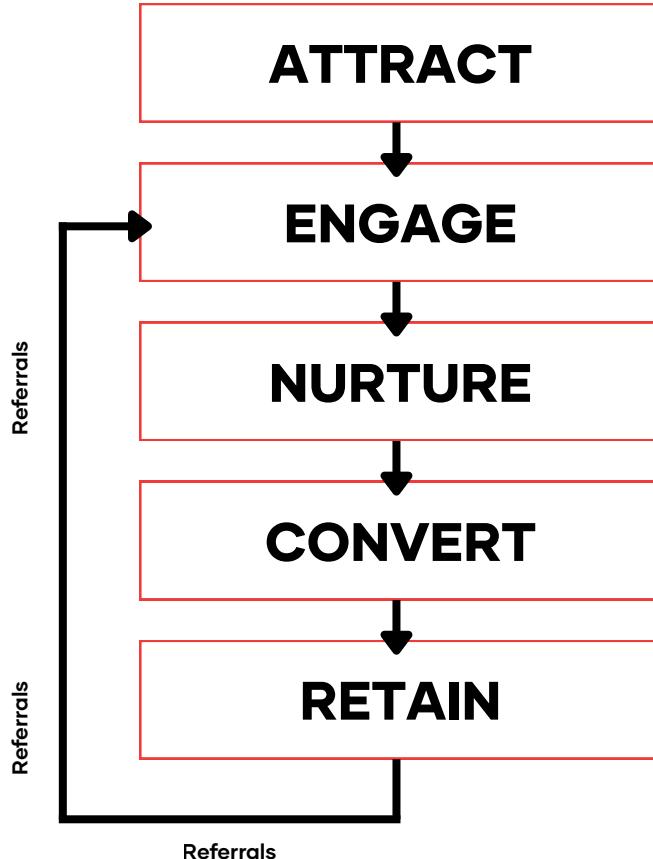
THE LEAD LIFECYCLE

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!

Core Audience Segments:



Clients



All Prospects



Cold Prospects



Warm Prospects



Hot Prospects



Gold Prospects

Q4 2025 QUARTERLY FINANCIAL UPDATE

Quarterly Financial Update
Release Date: January 12



TIMELY EMAILS

Launch ASAP



FRESH START

Visual Insights Newsletter



NEW YEAR & MARTIN LUTHER KING JR. DAY

Holiday Emails



ANTI-REGRET PLAYBOOK: LESSONS FROM THOSE WHO'VE BEEN THERE

Visual Insights Newsletter



HIGH EARNERS: THE COORDINATION PROBLEM

Single 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



HIDDEN TAX OPPORTUNITIES

Lead Generation Campaign



VALENTINE'S DAY & BLACK HISTORY MONTH

Holiday Emails



LIFE'S FINANCIAL TURNING POINTS

Visual Insights Newsletter

1



90-Day New Client Onboarding

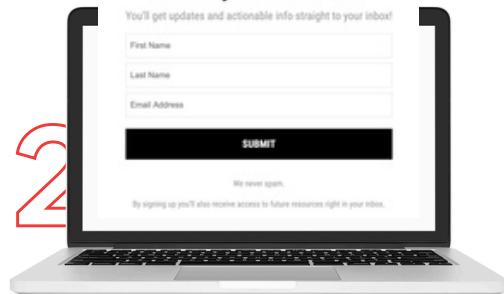
Join my insider's list!

You'll get updates and actionable info straight to your inbox!

First Name
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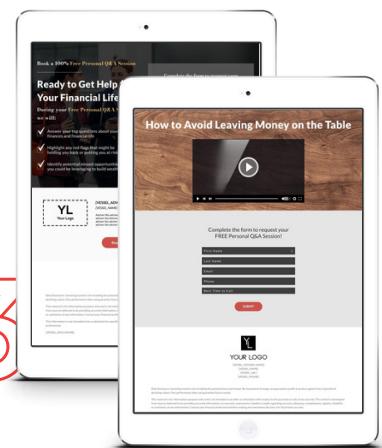
SUBMIT

2



Website Opt-in Form

3



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

GET SOCIAL

Martin Luther King Jr. Day - 01/19

"The time is always right to do what is right."
– Martin Luther King Jr.

Let's carry Dr. King's message forward by making intentional, positive choices every day.

Which act of kindness or service will you commit to today?

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.)

International Day of Education - 01/24

Happy International Day of Education! My job isn't just about numbers. It's about education.

Helping people understand their options, ask better questions, and feel confident about their future is at the heart of what I do.

Need help putting a plan together? Let's connect and make this your best financial year yet.

Happy New Year! 2026 is a fresh start to make your financial goals a reality.

Take a close look at your budget, eliminate what doesn't matter, and invest in what does.

Ready to plan with confidence? Let's connect and make this your best financial year yet.

Post this on New Year's Day - 01/01

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.

Jan 1
New Year's Day

Jan 1
World Day of Peace

Jan 4
World Braille Day

Jan 10
National Vision Board Day

Jan 19
Martin Luther King Jr. Day

Jan 24
International Day of Education

EVENT PLANNING

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

In honor of National Vision Board Day on January 10, host a hands-on workshop that helps clients bring their goals to life.

Provide vision board supplies, simple prompts, and a comfortable space for creativity and conversation.

This inspiring event blends personal reflection, financial goal-setting, and casual networking—making planning feel approachable and energizing.



FINANCIAL MOVIE NIGHT

Use the power of storytelling to connect with clients and their families at a movie night built around films that reflect real-world financial themes, like *The Pursuit of Happyness* or *Moneyball*.

After the screening, guide a short discussion that ties the story back to smart decision-making and long-term planning.

It's a fun, memorable way to reinforce your expertise without feeling formal.

JANUARY

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

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

