

J U N E 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

Mid-Year Financial Check-In



2

Graduation Season Planning



3

Summer Travel & Budgeting Tips



COMPLETE STRATEGY

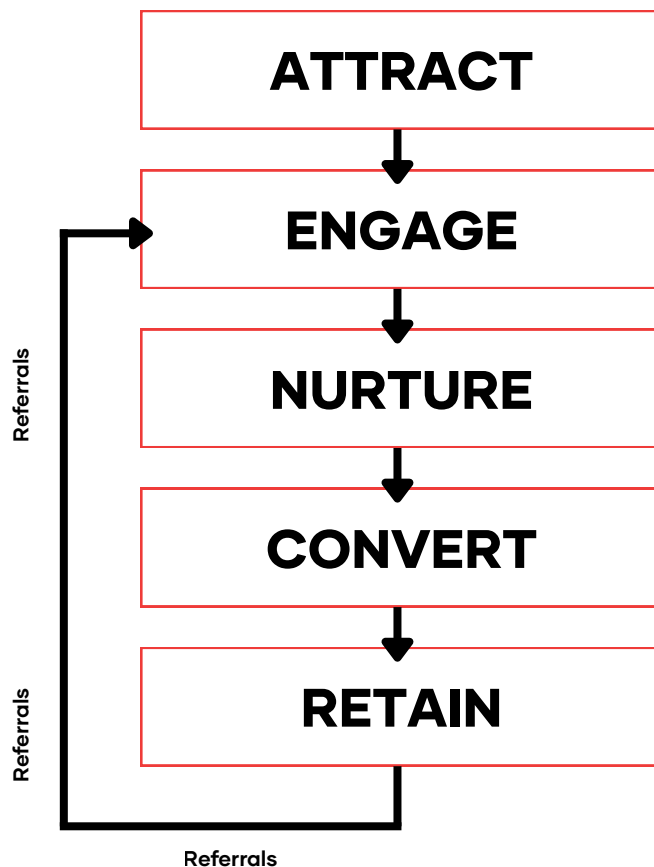
THE LEAD LIFECYCLE

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 during our Launch It! Marketing Plan Workshop. [Register Here.](#)

Core Audience Segments:



Clients



All Prospects



Cold Prospects



Warm Prospects



Hot Prospects



Gold Prospects

WHY 529 PLANS DESERVE ANOTHER LOOK

Single Email



THE ESTATE PLAN THAT BACKFIRES

Visual Insights Newsletter



TRAVEL SAFETY TIPS

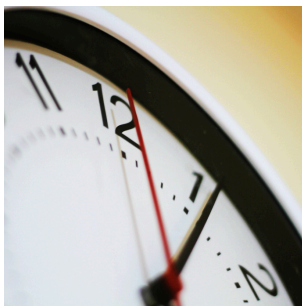
Visual Insights Newsletter



OR

TIMELY EMAILS

Launch ASAP



SOCIAL SECURITY TAXATION

Personal Connection Video



FATHER'S DAY & JUNETEENTH

Holiday Emails



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.



INVESTMENT PORTFOLIO REVIEW CHECKLIST

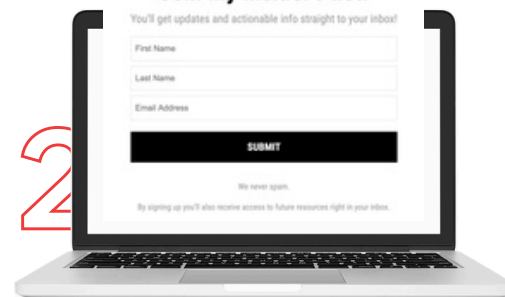
Lead Generation Campaign



THE ROTH IRA 5-YEAR RULE EXPLAINED

Personal Connection Video

2



Website Opt-in Form



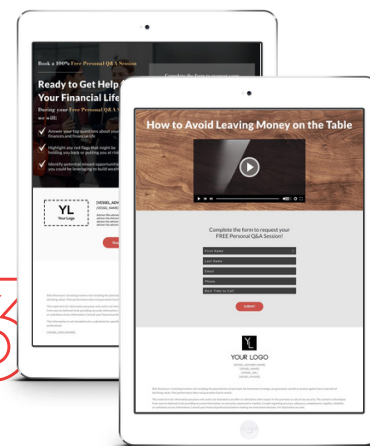
5 FINANCIAL QUESTIONS FOR THE SUMMER

Single Email



Prospect Engagement Campaign and Visual Insights Newsletter

3



8-Week Prospect Nurturing Campaign

(with or without video)

GET SOCIAL

Post this on Juneteenth - 06/19

Juneteenth is a time to reflect on freedom, resilience, and opportunity.

For many families, financial planning is part of building a lasting legacy—creating stability, protecting loved ones, and opening doors for the future.

Today, we honor the past and look ahead with purpose.

[CTA: Start a conversation]

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.)

Dads are often the steady hand behind the plan—and the heart behind so many family goals.

This Father's Day, we celebrate the dads and father figures who lead with love, wisdom, and care.

If protecting your family's future is on your mind, we're here to help.

[CTA: Connect / Book a planning session]

Post this on Father's Day - 06/21

Summer is here—and so are vacations, weekend getaways, and travel plans.

Before you pack your bags, set a budget, plan for extras, use rewards wisely, and avoid carrying vacation expenses into the fall.

A little planning now can help you enjoy the season without losing sight of your bigger financial goals.

[CTA: Connect / Book a planning session]

Post this anytime after 06/21

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.

Pride Month

National Homeownership Month

National Internet Safety Month

June 6
D-Day

June 7
Cancer Survivors Day

June 19
Juneteenth

June 21
Father's Day

June 21
First Day of Summer

EVENT PLANNING

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



CLIENT APPRECIATION BBQ

Kick off summer with a relaxed BBQ featuring cookout favorites, cold drinks, lawn games, and casual conversation.

Clients can enjoy a fun, low-pressure gathering while advisors strengthen relationships outside the office. Add a local BBQ vendor, live music, or a “bring a friend” invitation to make it feel extra special.

A laid-back way to thank clients and create warm community connections.

Best for: Summer kickoff, client appreciation events, referral-friendly events



FATHER'S DAY LEGACY LUNCH

Celebrate Father's Day with a meaningful lunch or brunch where clients can bring a father, child, or special family member.

Clients can enjoy a warm gathering while advisors create space for conversations about family, values, and legacy. Add conversation cards, a small keepsake, or a family photo moment.

A thoughtful way to honor fathers and build multigenerational connections.

Best for: Father's Day, legacy planning events, multigenerational client events

JUNE

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

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
1	2	3	4	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30			