

MARCH 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 Spring Cleaning



2

Preparing for Tax Season



3

Women's History Month



COMPLETE STRATEGY

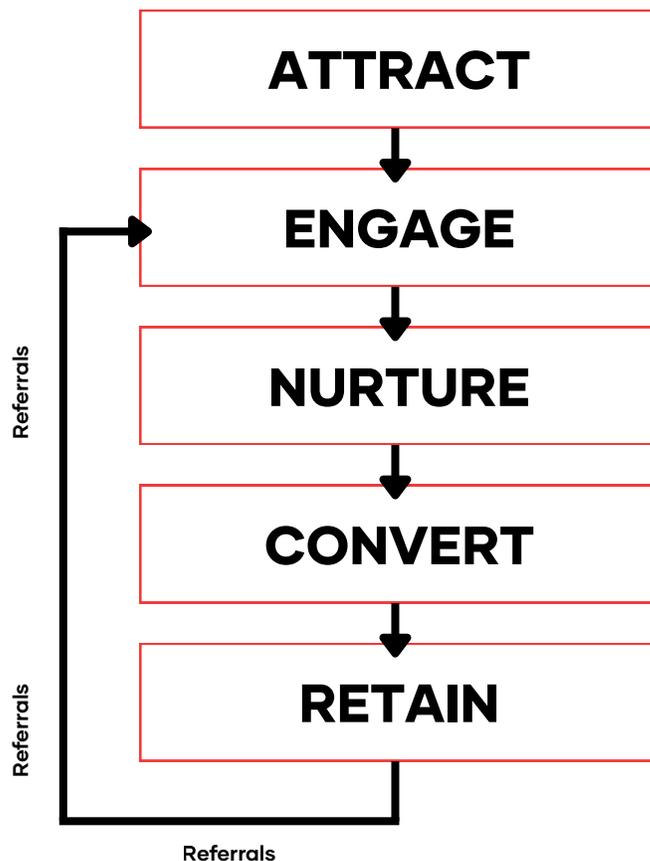
THE LEAD LIFECYCLE

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

RETIREMENT INCOME ESSENTIALS

Prospect Engagement Campaign



TAX LITERACY QUIZ

Visual Insights Newsletter



CREATING MULTIGENERATIONAL WEALTH

Visual Insights Newsletter



OR

TIMELY EMAILS

Launch ASAP



WHEN IS IT TIME TO HIRE A FINANCIAL ADVISOR?

Ready Video Campaign



GENERAL SPRING SEASON

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.



WHAT IS A REQUIRED MINIMUM DISTRIBUTION AND WHEN DO THEY START?

Personal Connection Video



HIGH EARNING PROFESSIONALS

Prospect Engagement Campaign

2



Website Opt-in Form



TAX PLANNING

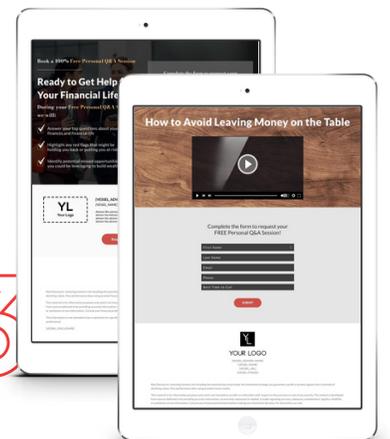
Prospect Engagement Campaign



THE THREE CHAPTERS OF RETIREMENT

Visual Insights Newsletter

3



8-Week Prospect Nurturing Campaign

(with or without video)

GET SOCIAL

Post this any time in March

Before you spring clean the garage...🧹
Clean up your finances.
Small adjustments today can create big clarity tomorrow.
Ready for a spring check-in? I'm here.

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.)

Today is International Women's Day! 🌸
A day to recognize the strength, resilience, and impact of women everywhere.
I'm especially grateful for [SIGNIFICANT WOMAN] for [TRAIT / IMPACT].
Who are you celebrating today?

Post this International Women's Day - 03/08

"Your grandparents made intentional decisions so you'd have choices."
That's what thoughtful financial planning does. It creates options.
On National Future Generations Day, I'm grateful for the families who trust me to help protect their future — not just for themselves, but for generations to come.
If building a lasting legacy is important to you, let's build a strategy that reflects that.

Post this on National Future Generations Day - 03/20

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.

Mar 3-2
Purim

Mar 6
Employee Appreciation Day

Mar 8
Daylight Savings

Mar 14
Pi Day

Mar 17
St. Patrick's Day

Mar 20
Spring Equinox

EVENT PLANNING

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



POT OF GOLD SCAVENGER HUNT

Host a “Scavenger Hunt for Gold Coins” this St. Patrick’s Day, hiding chocolate coins or branded items with clues tied to financial tips.

Clients will debunk myths, learn strategies, and see how long-term decisions beat quick wins.

Keep it fun with themed refreshments, playful prizes, and interactive discussions. Reward participants with gold coins, a financial book, or a small gift.

A hands-on way to connect, educate, and show that strategy always wins—while celebrating the luck of the Irish!



TRAILBLAZING WOMEN IN FINANCE

Celebrate Women’s History Month with a “Trailblazing Women in Finance” session, featuring a guest speaker on investing, wealth-building, and challenges unique to women.

Clients will leave inspired, with practical strategies to take charge of their financial future.

Host in a welcoming space with light refreshments and networking, and offer a takeaway guide or small gift.

A meaningful way to educate, empower, and connect women while honoring leaders who paved the way in finance.

MARCH

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
30	31			