

THE **MARKETING MIX**

April 2025

3

Seasonal **themes**
& **topics** to help

AMPLIFY YOUR MARKETING RESULTS

Look inside for more tips!

Cold to Gold Framework | **Social Media Prompt** | **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.



Financial Literacy Month



First Quarter Financial Check-In



National Retirement Planning Month

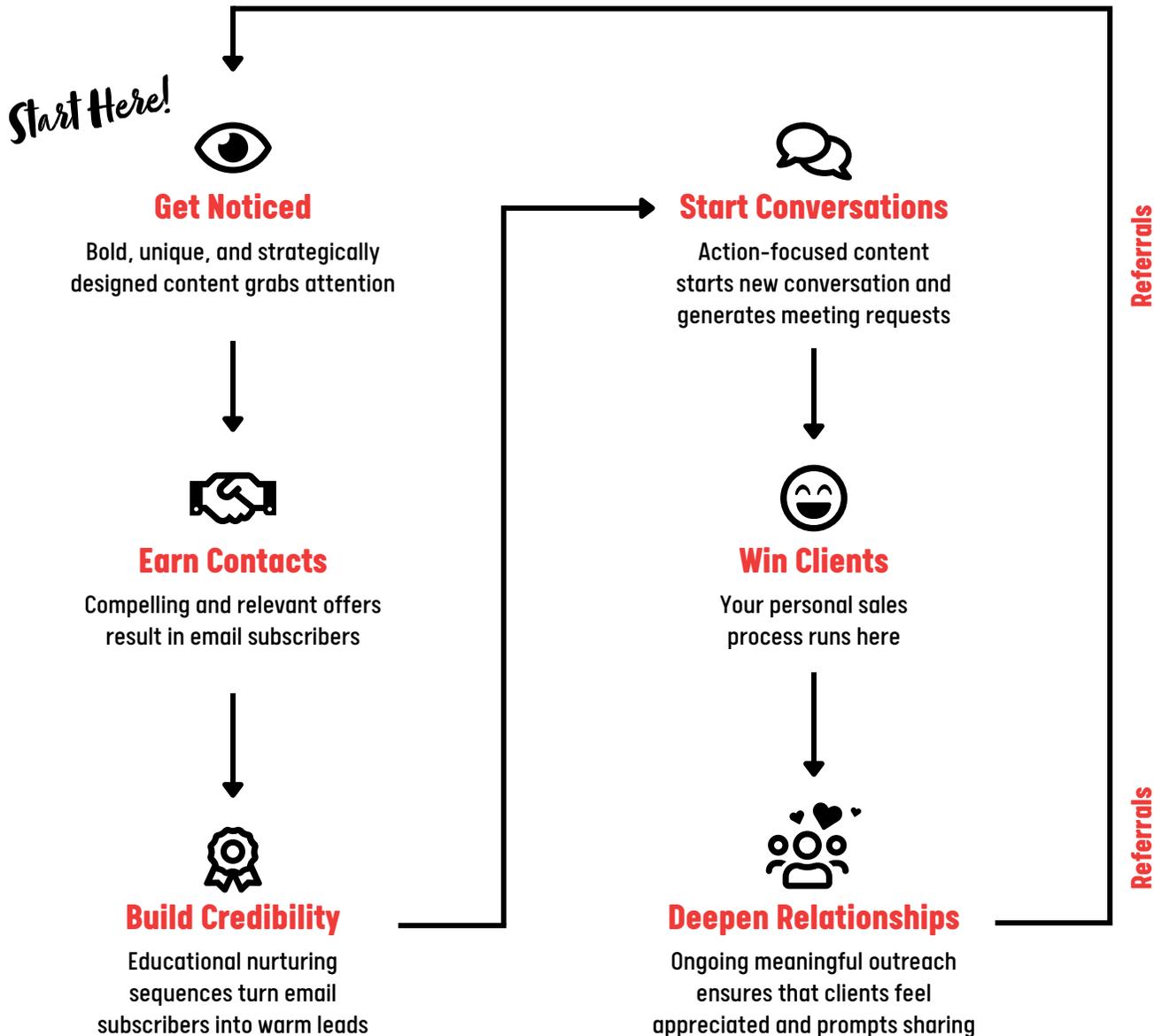
Achieve better results with a **COMPLETE STRATEGY**

The Cold to Gold framework

The **Cold to Gold Framework** is our proven strategy to help you take your prospects and turn them into clients.

The campaigns in this Marketing Mix fit into various positions within the framework to help you create a robust marketing experience for your clients and prospects.

Match up the icons below to the campaigns within the mix!



4 CAMPAIGNS

to *jumpstart* the month

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](#)

COLD TO GOLD

Just a little reminder :)



Get Noticed



Earn Contacts



Build Credibility



Start Conversations



Win Clients



Deepen Relationships



Q1 2025 Financial Update
Quarterly Financial Update



Scheduled Release: Apr. 8



Roth Conversions
Single Email



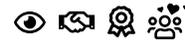
Building Your Business Legacy: Strategies for Leadership, Succession, and Growth
Visual Insights Newsletter



OR



Financial Literacy Quiz
Visual Insights Newsletter



Timely Emails
Launch as soon as possible



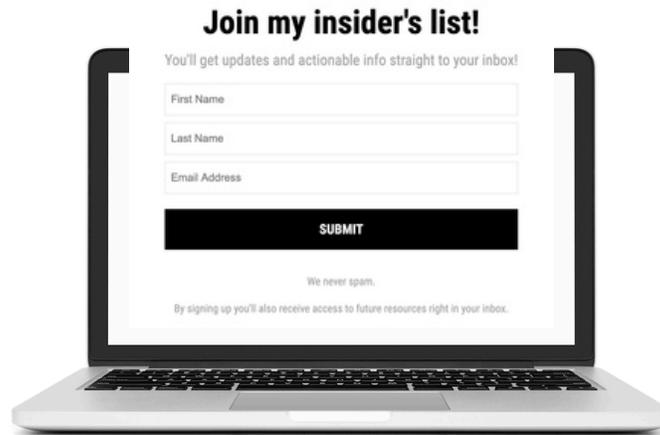
Let's start with the ESSENTIALS

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.

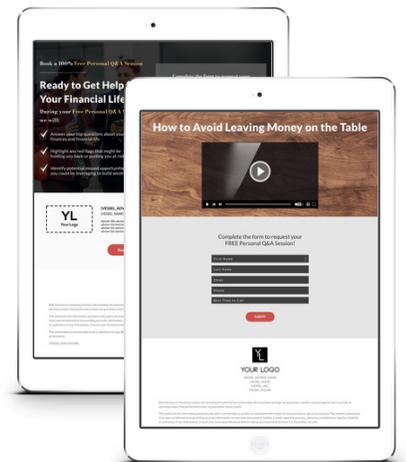
90-Day New Client Onboarding



Website Opt-in Form



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

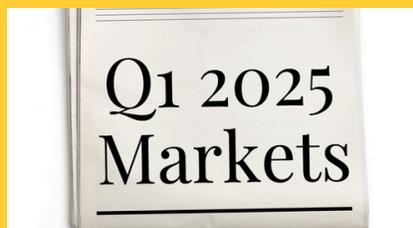


Coming Soon!

You won't want to miss these dropping soon!



High-Net-Worth Individual
Prospect Engagement Campaign



Q1 2025 Financial Update
Quarterly Financial Update



6 Pillars for High-Net-Worth Management
Visual Insights Newsletter

GET SOCIAL!

Marketing doesn't start and end with automation. Personal posts are still critical to building those connections.

To do: 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.)

Social Media Prompt of the Month:

.....

Post this on Tax Day - Apr 15

Tax season: done and dusted! Was your filing stress-free, or did you find yourself cutting it close? Proactive tax planning can help you keep more of your hard-earned money. I'm here if you'd like to discuss ways to optimize your taxes for next year. Let's get ahead of it together!



Post any day in April for Stress Awareness Month

April is here, and with it comes Stress Awareness Month. Stress can affect us all, no matter our stage in life or circumstances. Personally, I'm making an effort to check in with my mental health more often. One of my favorite ways to unwind is [describe your favorite way to destress]. How do you like to relax and destress?



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.

- April Fools Day - Apr 1
- Passover - Apr 12-20
- Tax Day - Apr 15
- Good Friday - Apr 18
- Easter Monday - Apr 21
- Earth Day - Apr 22

GATHER 'ROUND

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



Financial Literacy Month Bingo

Celebrate Financial Literacy Month with a fun bingo challenge!

Fill a card with key financial milestones like "reviewed credit score" and "opened an IRA." Clients can check off squares during workshops, webinars, or consultations, aiming for a full line or blackout.

Boost the excitement with prizes and a virtual leaderboard to spice up the competition. A playful way to educate and engage!

Retirement Planning Picnic

Show clients that retirement is about planning, not just saving.

Guide them through smart strategies for a secure future in a relaxed outdoor setting—picnics encouraged!

Add a fun twist with a "Retirement Bucket List" activity, where clients list their dream activities and learn how to make them happen.

A casual, engaging way to inspire action and spark retirement planning!



APRIL MARKETING CALENDAR

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

| Monday | Tuesday | Wednesday | Thursday | Friday |
|--------|---------|-----------|----------|--------|
| | 1 | 2 | 3 | 4 |
| 7 | 8 | 9 | 10 | 11 |
| 14 | 15 | 16 | 17 | 18 |
| 21 | 22 | 23 | 24 | 25 |
| 28 | 29 | 30 | | |

*Marketing Hub availability on enterprise platforms is dependent on enterprise approval.