

THE MARKETING MIX

August 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.



Black Business Month



Back to School Month



What Will Be Your Legacy Month

Achieve better results with a

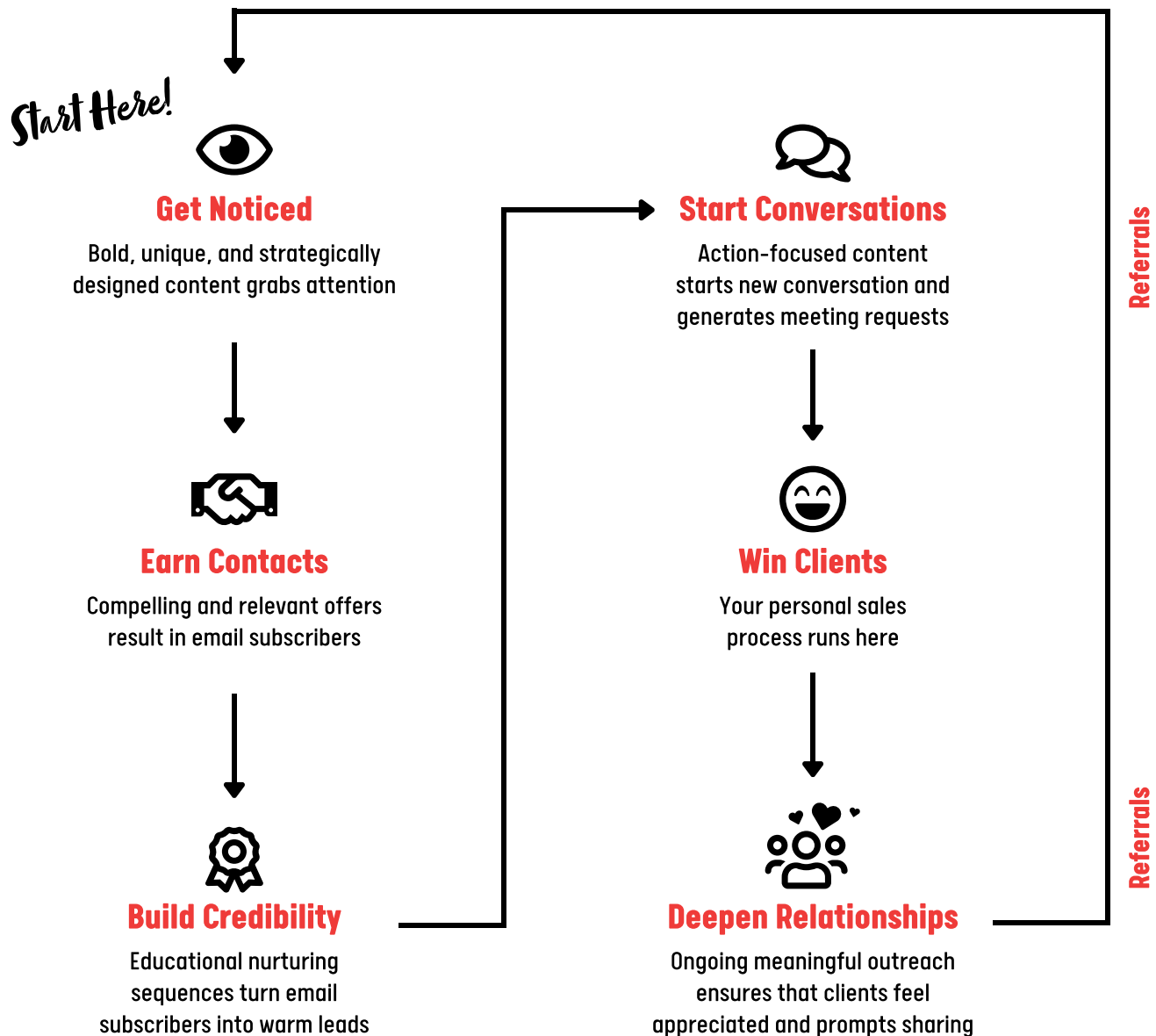
COMPLETE STRATEGY

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!



5 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](#)

Just a little reminder :)



Get Noticed



Earn Contacts



Build Credibility



Start Conversations



Win Clients



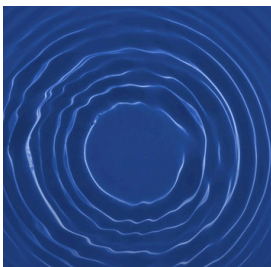
Deepen Relationships



Wealth Management Beyond Basics
Personal Connection Video



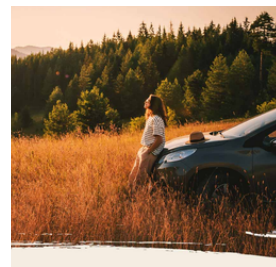
Connecting with the Next Generation
Email Drip Series



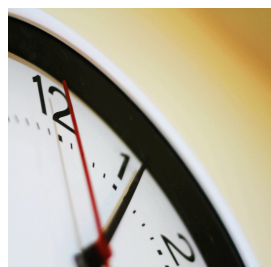
From Policy to Portfolio:
How Tariffs Take a Toll
Visual Insights Newsletter



OR



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



Timely Emails
Launch as soon as possible



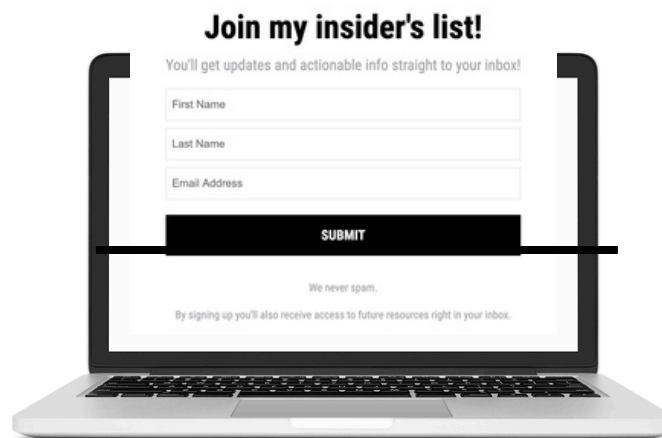
Let's start with the ESSENTIALS

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!



**Why Market Highs Feel So Scary
(Even When History Says "Relax")**
Visual Insights Newsletter



**Tax Changes Ahead:
7 Updates That May Affect You**
Personal Connection Video

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:

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Post this on National Financial Awareness Day - August 14

Happy National Financial Awareness Day!

Money goals without a plan are just dreams. Whether you're aiming to retire early, save for college, or finally take that dream vacation, I'm here to help you build a financial strategy to get there.

☎ Call us at [OFFICE NUMBER] or book a free consultation today.



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.

- Child Support Awareness Month
- World Lung Cancer Day - August 1
- Book Lover's Day - August 9
- National Financial Awareness Day - August 14
- National Senior Citizens Day - August 21
- Women's Equality Day - August 26

GATHER 'ROUND

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



“Wine Down Summer” Tasting Event

Uncork some great conversation at your “Wine Down Summer” tasting event—where clients can kick back with a glass of wine and chat about what really matters.

No suits, no pressure—just good wine, light-hearted vibes, and real talk about goals, life, and everything in between. It’s a laid-back way to remind clients that planning for the future doesn’t have to feel overwhelming.

Cheers to making financial conversations a little more enjoyable.

“Back-to-School for Grown-Ups” Workshop

Host a “Back-to-School for Grown-Ups” workshop where clients can brush up on the financial lessons that matter most—without the homework or test anxiety.

Think fewer textbooks, more real-life takeaways—like how to budget for college, talk to kids about money, or navigate the financial changes that come with each stage of life.

It’s an approachable, no-pressure way to turn financial literacy into a conversation—one that empowers clients to feel confident, informed, and in control.



AUGUST MARKETING CALENDAR

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

Monday	Tuesday	Wednesday	Thursday	Friday
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29

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