

# THE MARKETING MIX

December 2024

# 3

Seasonal themes  
& topics to help

**AMPLIFY YOUR  
MARKETING  
RESULTS**

Look inside for more tips!

Cold to Gold Framework | Social Media Prompts | Suggested Calendar | 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.



**End of Year Planning**



**Tax Strategy**



**National Giving Month**

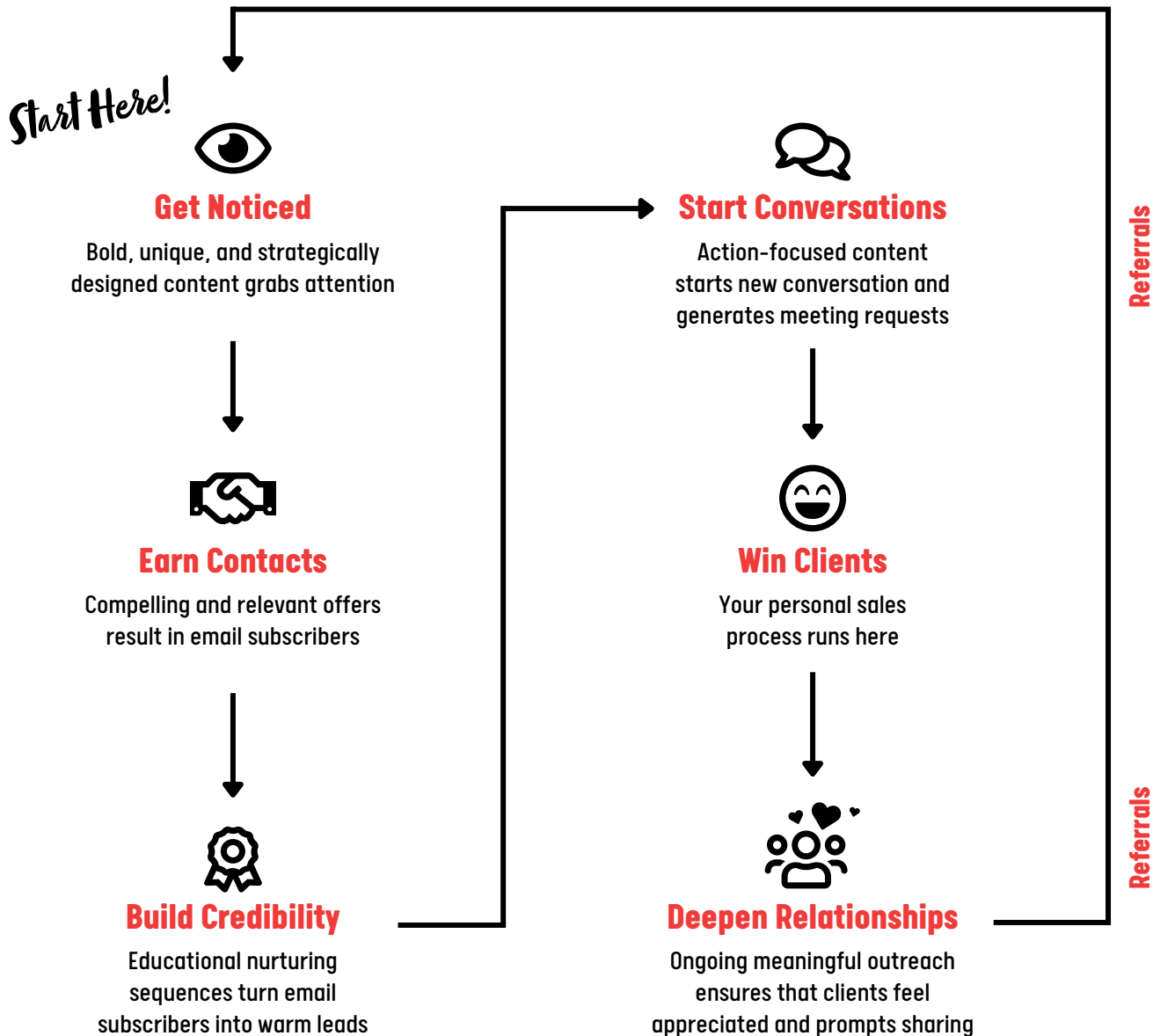
# Achieve better results with a **COMPLETE STRATEGY**

*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](#)

**COLD TO GOLD**

*Just a little reminder :)*



**Get Noticed**



**Earn Contacts**



**Build Credibility**



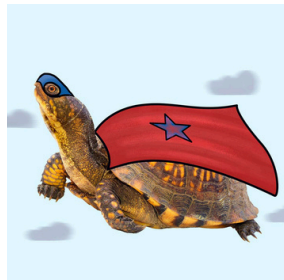
**Start Conversations**



**Win Clients**



**Deepen Relationships**



**Annuities & Guaranteed Income**  
Lead Generation Campaign



**Customizable Education Event Campaign**  
Client Retention Campaign



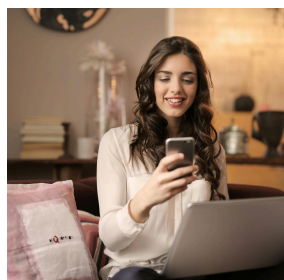
**Empowering Financial Conversations**  
Visual Insights Newsletter



OR



**Tax Literacy Quiz**  
Visual Insights Newsletter



**EYO Client Letter**  
Single Email  
Release Date: 12/04



**Timely Emails**  
Launch as soon as possible



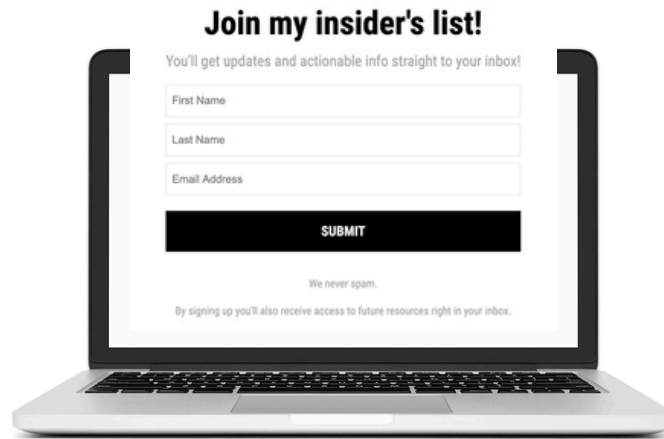
# Let's start with the ESSENTIALS

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.

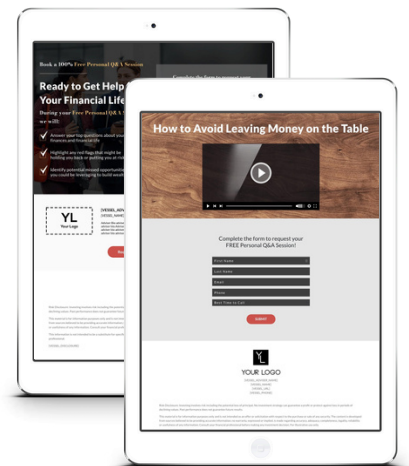
## 90-Day New Client Onboarding



## Website Opt-in Form



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



# Coming Soon!

You won't want to miss these dropping in the following weeks.



**EOY Client Letter**  
Single Email



**The Retiree's Time Machine: Lessons from Your Future Self**  
Visual Insights Newsletter



**90 Day New Client Onboarding**  
New Client Onboarding Campaign

# 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 Prompts of the Month:

### Post this on Hanukkah - December 7 - 15

Wishing a joyous Hanakkah to my Jewish friends and clients in the [LOCATION] community! Hanukkah isn't just about the candles—it's about the resilience, strength, and determination that keep them burning bright. As we reflect on this year, let's celebrate our own victories, big and small. What's one thing you persevered through in 2024? Let's celebrate your story!

### Post this on Christmas Eve or Day - December 24 /25

As we gather with loved ones, I'm reminded that the best gifts don't come wrapped—they're in the laughter, kindness, and connections we share. [OPTIONAL: Include examples of simple joys, e.g. "Whether it's baking cookies, enjoying a cozy movie night, or simply being present with family"], it's the little things that make the season special. Wishing you a holiday filled with warmth, joy, and the spirit of togetherness. What's your favorite part of the season?

### Post this on New Year's Eve - December 31

Here's a glimpse of some of my favorite moments from 2024 [Include photos of your highlights from 2024]. I'm grateful for the opportunity to serve the [TARGET AUDIENCE] in the [LOCATION] community. Looking ahead to 2025, I'm excited to continue supporting your financial growth and helping you reach new milestones. My resolution? To bring you even more resources to help navigate life's financial ups and downs. What's a goal you're setting for the new year? Let's make it happen together!

## 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.

Dec 1  
World AIDS Day

Dec 3  
International Day of Persons with Disabilities

Dec 23  
Festivus

Dec 24  
Christmas Eve

Dec 25  
Christmas Day

Dec 25 - Jan 2, 2025  
Hanukkah

Dec 26  
Boxing Day

Dec 26 - Jan 1, 2025  
Kwanzaa

Dec 31  
New Year's Eve

# GATHER 'ROUND

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



## **Candy Canes, Cocoa, & Santa**

Host a festive family holiday event that brings clients and their loved ones together for some holiday cheer! Set up a cozy space with candy canes, cocoa, and seasonal treats, and invite Santa for a special meet-and-greet.

Hire a photographer to capture family photos with Santa as a keepsake. To add a heartwarming touch, organize a toy drive where clients can bring a donation for children in need. It's a wonderful way to spread holiday joy and connect with clients in a fun, memorable way!

---

## **Family Memories Day**

Invite clients and their families to an afternoon of capturing and celebrating family memories! A professional photographer will create beautiful family portraits as lasting keepsakes, while family history prompts inspire storytelling and shared moments.

It's a unique opportunity to connect across generations and preserve treasured stories—all thoughtfully hosted by your firm for a day of bonding, laughter, and legacy!



# DECEMBER MARKETING CALENDAR

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			

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