

THE MARKETING MIX

December 2025

3

Seasonal themes
& topics to help

**AMPLIFY YOUR
MARKETING
RESULTS**

Look inside for more tips!

Cold to Gold Framework

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.



End of Year Planning



Tax Strategy



National Giving Month

Achieve better results with a

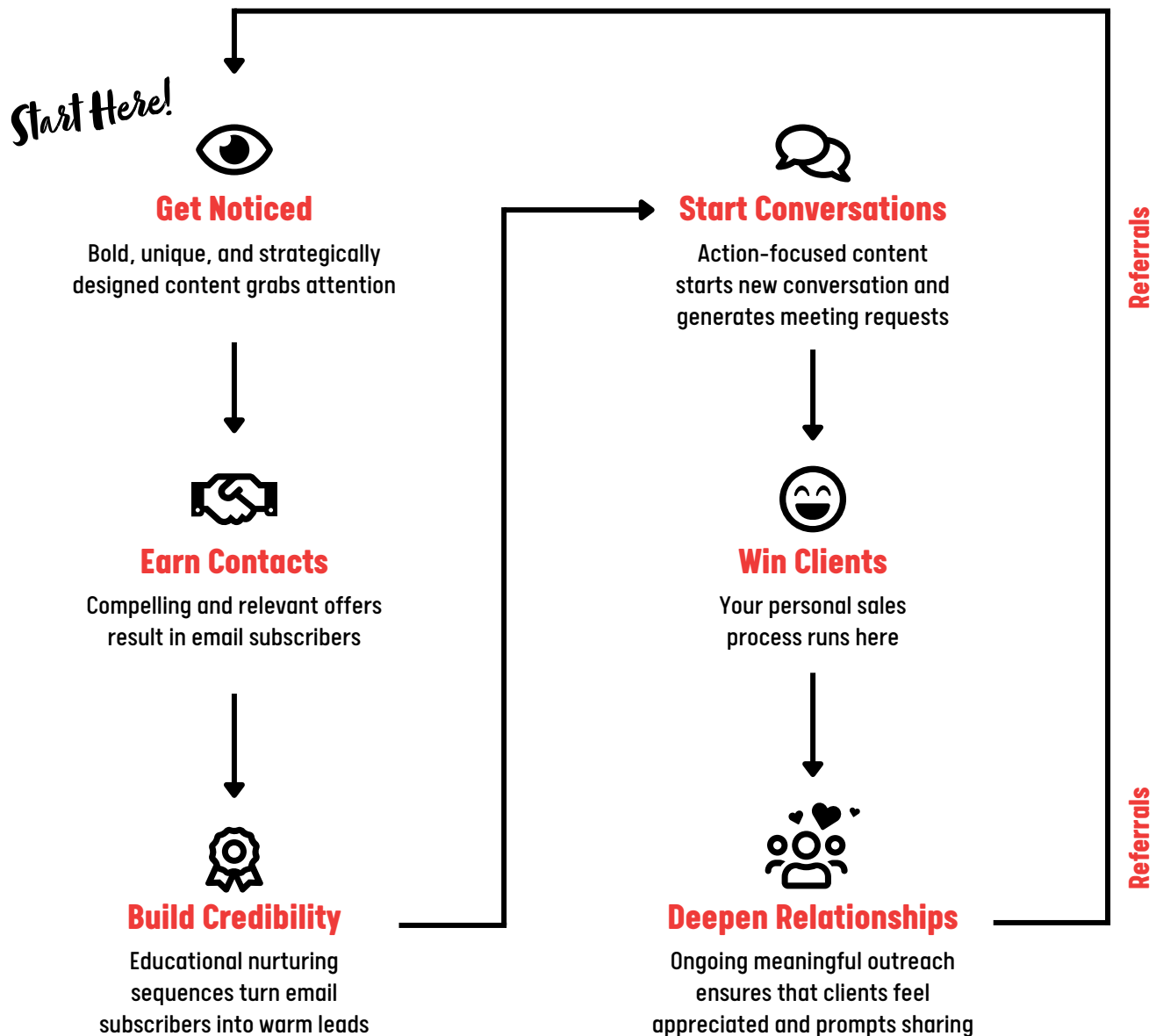
COMPLETE STRATEGY

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!



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](#)

Just a little reminder :)



Get Noticed



Earn Contacts



Build Credibility



Start Conversations



Win Clients



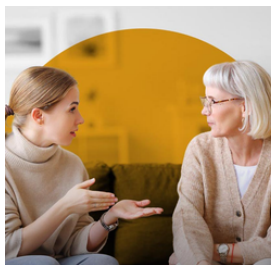
Deepen Relationships



2025 Hidden Tax Opportunities
Lead Generation Campaign



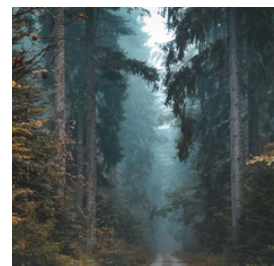
EOY Client Letter
Single Email
Release Date: Dec. 3rd



Starting the Long-Term Care Conversation
Visual Insights Newsletter



OR



The Power of Small Daily Actions
Visual Insights Newsletter



General Winter Season
Holiday Email



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!



Redefining Wealth in Retirement

Personal Connection Video



The Anti-Regret Playbook: Lessons from Those Who've Been There

Visual Insights Newsletter



Retirement Income Essentials

Prospect Engagement Campaign



Christmas, Martin Luther King Jr. Day, New Years, and More

Holiday Emails

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:

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Post this for Hanukkah - December 14 - December 22

Wishing a meaningful and light-filled Hanukkah to my Jewish friends and clients here in [LOCATION]!

This season reminds us that even a small flame can shine through the darkest moments. As we wrap up 2025, what's one moment of resilience or growth you're proud of this year?

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

Merry Christmas to my wonderful clients and friends in [LOCATION]!

As I spend time with [MY FAMILY / LOVED ONES], I'm reminded that the best gifts aren't wrapped—they're the moments we share. Whether it's [FAVORITE TRADITION] or simply enjoying a quiet morning, I hope your day is filled with joy. What's your favorite part of the season?

Post this on New Year's Eve - December 31

2025 was full of growth, challenges, and memorable moments! Here are some highlights: [INSERT PHOTOS / STORIES]

I'm thankful for the trust of [TARGET AUDIENCE] in [LOCATION], and I can't wait to keep supporting your journey in 2026.

My personal resolution: [INSERT GOAL].
What goal are you setting for the new year?

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 14 - Dec 22
Hanukkah

Dec 23
Festivus

Dec 24
Christmas Eve

Dec 25
Christmas Day

Dec 26
Boxing Day

Dec 26 - Jan 1, 2026
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.



Client Appreciation Event

Host a festive and cheerful holiday gathering for your clients and their guests.

Partner with a local café, winery, or event space to create a warm environment filled with holiday treats, drinks, and seasonal décor.

Celebrate the season with laughter, conversation, and thoughtful gestures of gratitude.

This is a wonderful way to show clients you value their trust, deepen connections, and end the year on a joyful note.

Charity Drive / Volunteer Event

Bring clients together for a meaningful holiday experience that gives back to the community.

Organize a toy, food, or clothing drive—or plan a group volunteer day at a local charity or nonprofit.

Sharing in the spirit of giving creates lasting memories, strengthens relationships, and demonstrates your commitment to making a positive impact.

It's a thoughtful way to connect with clients while supporting causes that matter.



DECEMBER 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	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30	31		

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