

THE **MARKETING MIX**

February 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.



Tax Season Prep



Valentine's Day



Black History Month

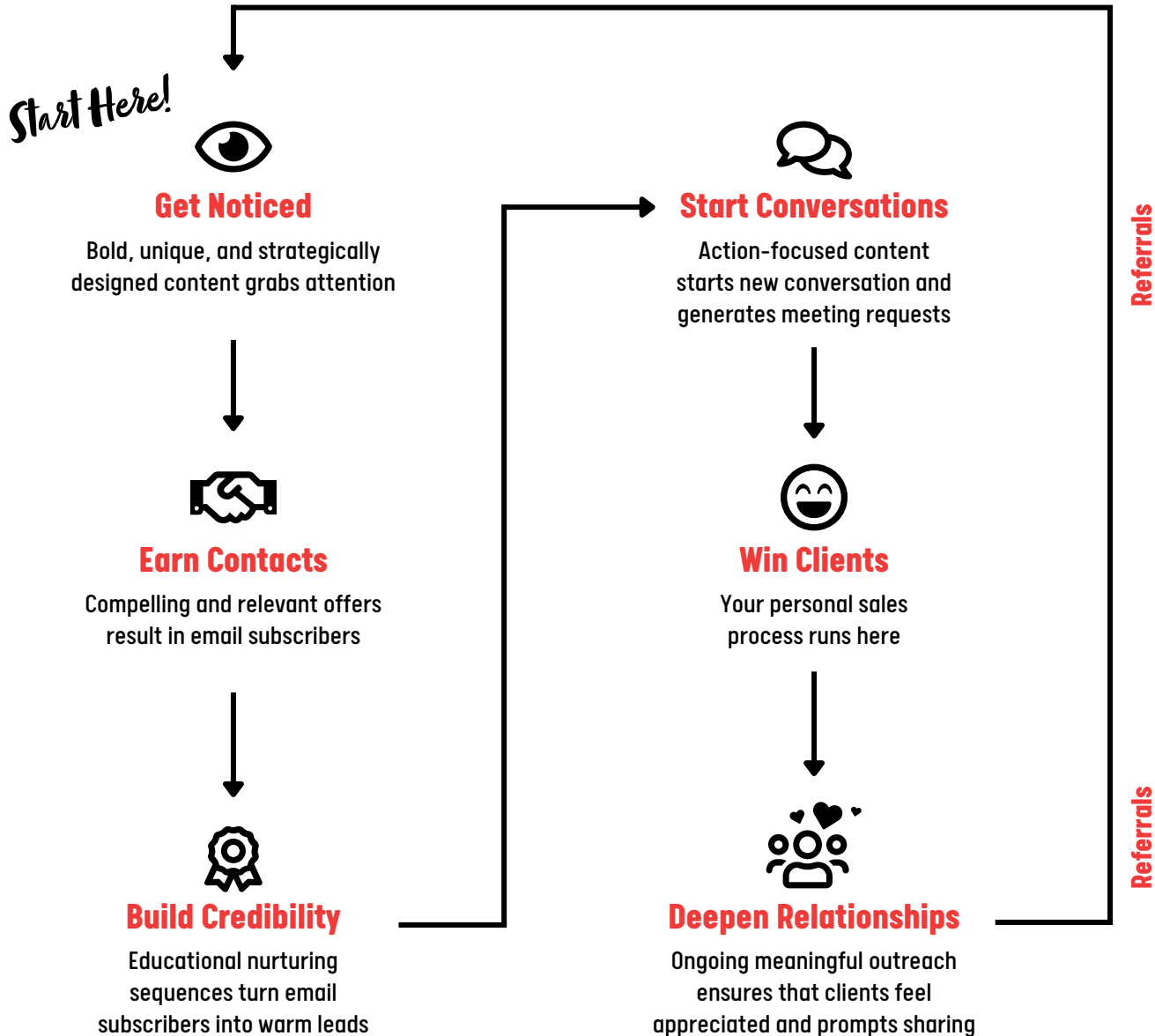
Achieve better results with a **COMPLETE STRATEGY**

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



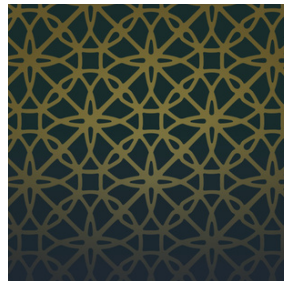
Start Conversations



Win Clients



Deepen Relationships



Hidden Tax Opportunities
Lead Generation Campaign



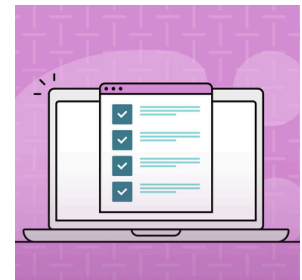
Timely Emails
Launch as soon as possible



5 Key Questions to Test Retirement Knowledge*
Visual Insights Newsletter



OR



The Surprising & Undeniable Power of Simple Lists in Financial Planning
Visual Insights Newsletter



Client NPS & Referral
Client Retention Campaign



Our new NPS & Referral Campaign, developed with Legacy, transforms client feedback into a powerful referral engine for your firm. Use NPS scores and Legacy's talk tracks to identify top promoters, strengthen relationships, and drive referrals with confidence.

Scheduled Release: Jan 23

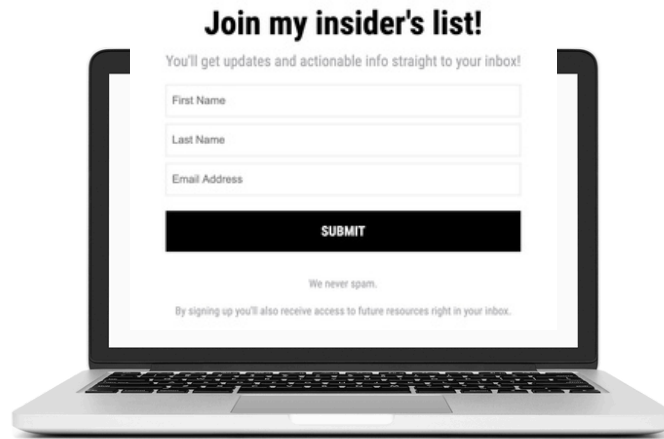
Let's start with the **ESSENTIALS**

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.

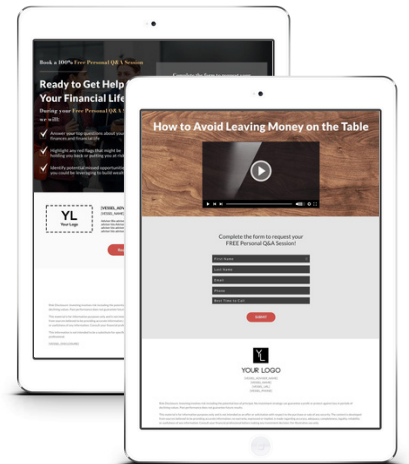
90-Day New Client Onboarding



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.



Medicare
Lead Generation Campaign



**Creating Multigenerational Wealth:
Strategies For Each Generation**
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 Valentine's Day - February 14

This Valentine's Day, I'm reminded that love is built on [key qualities you value, e.g., "consistency," "kindness," or "trust"]. Whether it's in [types of relationships, e.g., "a marriage," "friendships," or "partnerships"], it's the small, intentional actions that make the biggest difference. Let's celebrate love today—and find ways to keep it alive in the everyday. Happy Valentine's Day! ❤️



Post this on President's Day - February 17

Presidents' Day is a time to honor leadership and reflect on its meaning in our lives. In [areas where you lead, e.g., "my career," "my household," or "my community work"], I work to demonstrate [qualities important to you, e.g., "fairness," "adaptability," or "humility"]. True leadership is about actions that inspire others. What qualities guide your leadership journey?



Post Pairings

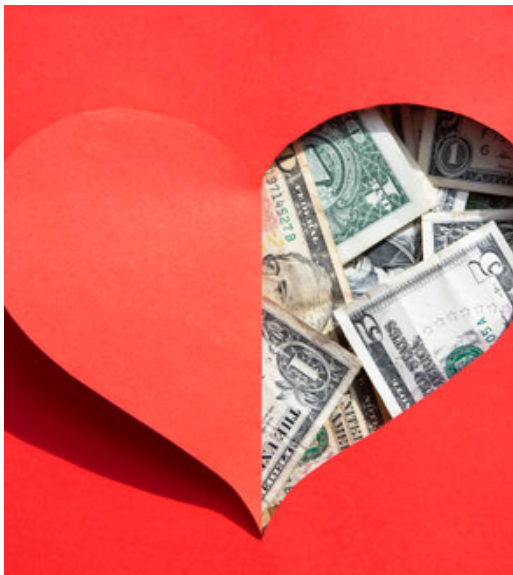
Find an accompanying stock image or personal photo to go along with these social post ideas!

Want to level-up? Drop a video and send a personal message instead.

- Groundhog Day - Feb 2
- World Cancer Day - Feb 4
- Superbowl Sunday - Feb 9
- International Day of Women and Girls in Science - Feb 11
- Abraham Lincoln's Birthday - Feb 12
- Random Acts of Kindness Day - Feb 17
- Pink Shirt Day - Feb 26

GATHER 'ROUND

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



Love & Money: Financial Planning for Couples

Celebrate Valentine's Day with a "Love & Money: Financial Planning for Couples" event. Help couples strengthen their financial partnership with insights on budgeting, shared goals, and estate planning.

Provide a "Couple's Financial Checklist" to guide meaningful conversations, and create a relaxed atmosphere with light refreshments and casual networking.

This engaging event will inspire couples to align their priorities and take actionable steps toward a secure financial future together.

Tax Prep & Planning Workshop

Simplify tax season for your clients with a "Tax Prep & Planning Workshop." This seminar or webinar will cover essential tips for organizing tax documents, maximizing deductions, and reducing taxable income.

Enhance the experience by partnering with a CPA to provide expert insights and answer questions.

Scheduled for early to mid-February, this workshop gives clients the tools and strategies they need to prepare with confidence and make the most of tax season.



FEBRUARY MARKETING CALENDAR

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

Monday	Tuesday	Wednesday	Thursday	Friday
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28

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