

THE MARKETING MIX

July 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.



Summer Celebrations



Pre-Retirement Planning



College Planning

Achieve better results with a

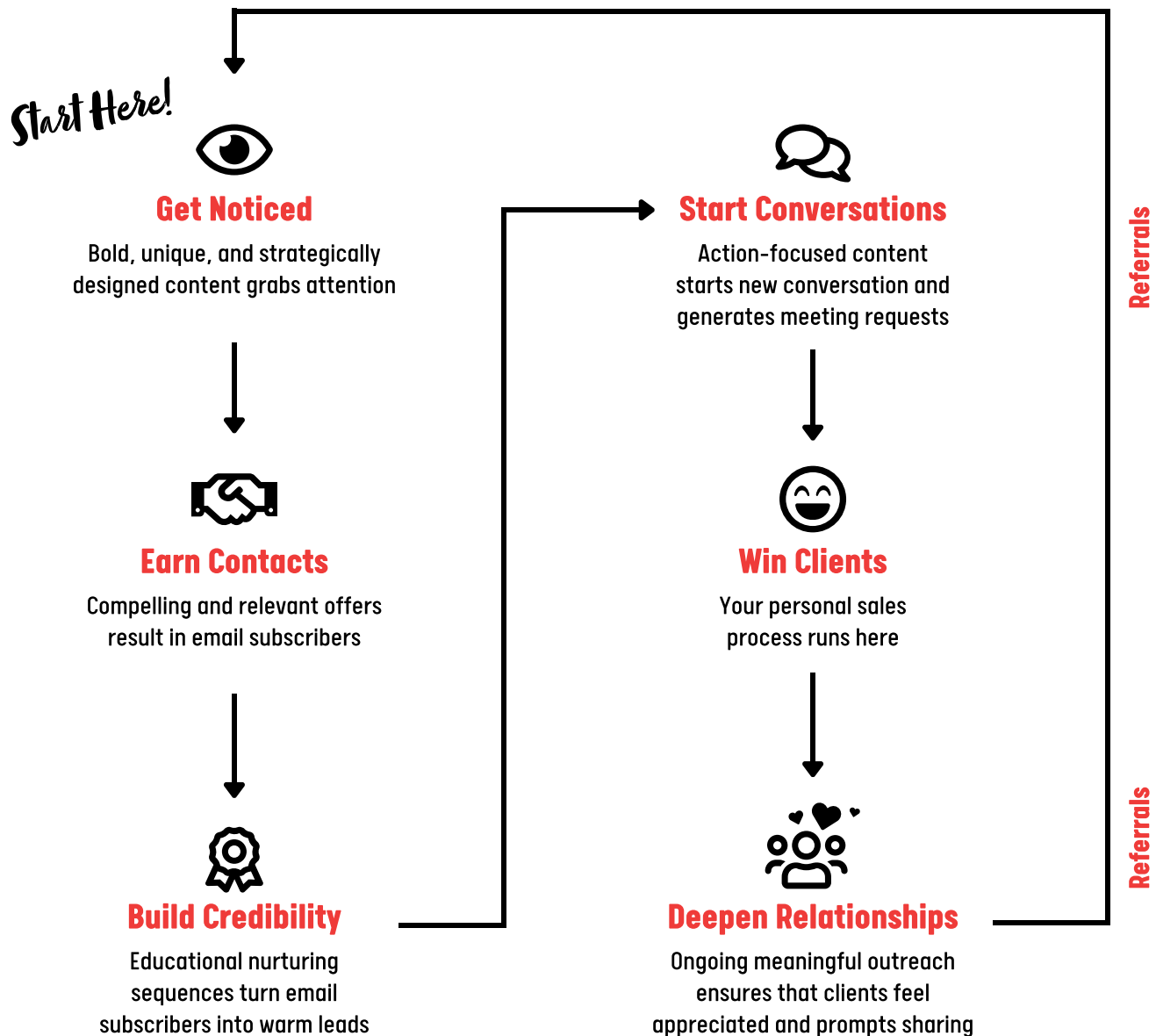
COMPLETE STRATEGY

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



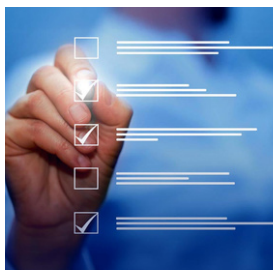
Start Conversations



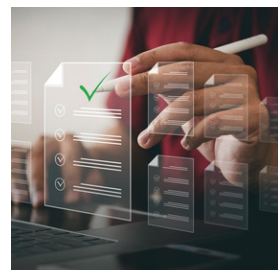
Win Clients



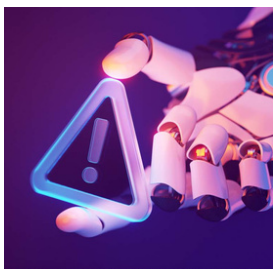
Deepen Relationships



Pre-Retirement Checklist
Lead Generation Campaign



Pre-Retirement Review
Prospect Engagement Campaign



**How AI Is Changing Fraud
(And What to Do About It)**
Visual Insights Newsletter



OR



**5 Key Questions to Test
Retirement Knowledge**
Visual Insights Newsletter



Q2 2025 Financial Update
Quarterly Financial Update



Scheduled Release: July 10



Timely Emails
Launch as soon as possible



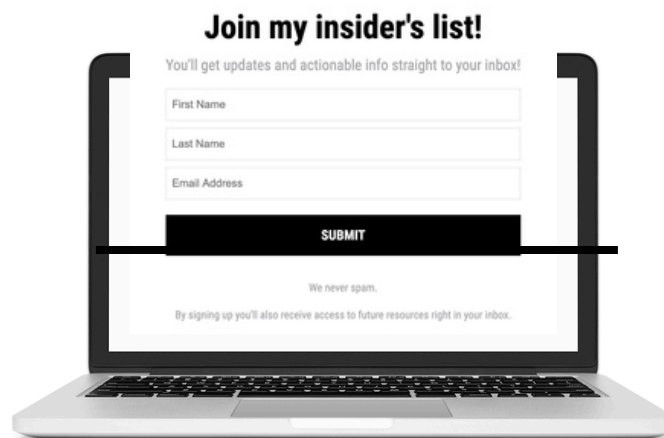
Let's start with the ESSENTIALS

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!



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



Q2 2025 Financial Update
Quarterly Financial Update



**When Success Demands Strategy:
Wealth Management Beyond Basics**
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 Independence Day - July 4

Happy 4th of July from [Your Firm Name or First Name]!

I'm grateful to be part of your journey toward greater independence – not just today, but every day.

Whatever financial freedom means to you, I'm here to help you reach it. Here's to freedom, family, and the future.



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.

- Canada Day - July 1
- National Financial Freedom Day - July 1
- Independence Day - July 4
- National Ice Cream Day - July 20
- Disability Independence Day - July 26

GATHER 'ROUND

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



Pizza & College Planning Night

Host a casual pizza night for families navigating the college planning journey—complete with slices, real talk, and helpful guidance.

Cover key strategies for FAFSA, 529 plans, and scholarships, with a local admissions expert on hand for Q&A.

No pressure. No jargon. Just good food and practical tips to help make the road to college feel a little less overwhelming.

Sip Into Retirement

Host an evening wine tasting at a vineyard or tasting room where pre-retiree clients can enjoy a glass of wine and have meaningful, pressure-free conversations about retirement.

Think fewer charts, more connection—just practical insights, approachable guidance, and a space where clients feel comfortable asking the questions on their mind.

It's a simple way to turn financial planning into something personal, empowering, and even enjoyable.



JULY 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	31	

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