

THE MARKETING MIX

June 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.



Mid-Year Financial Check-In



Graduation Season Planning



Summer Travel & Budgeting Tips

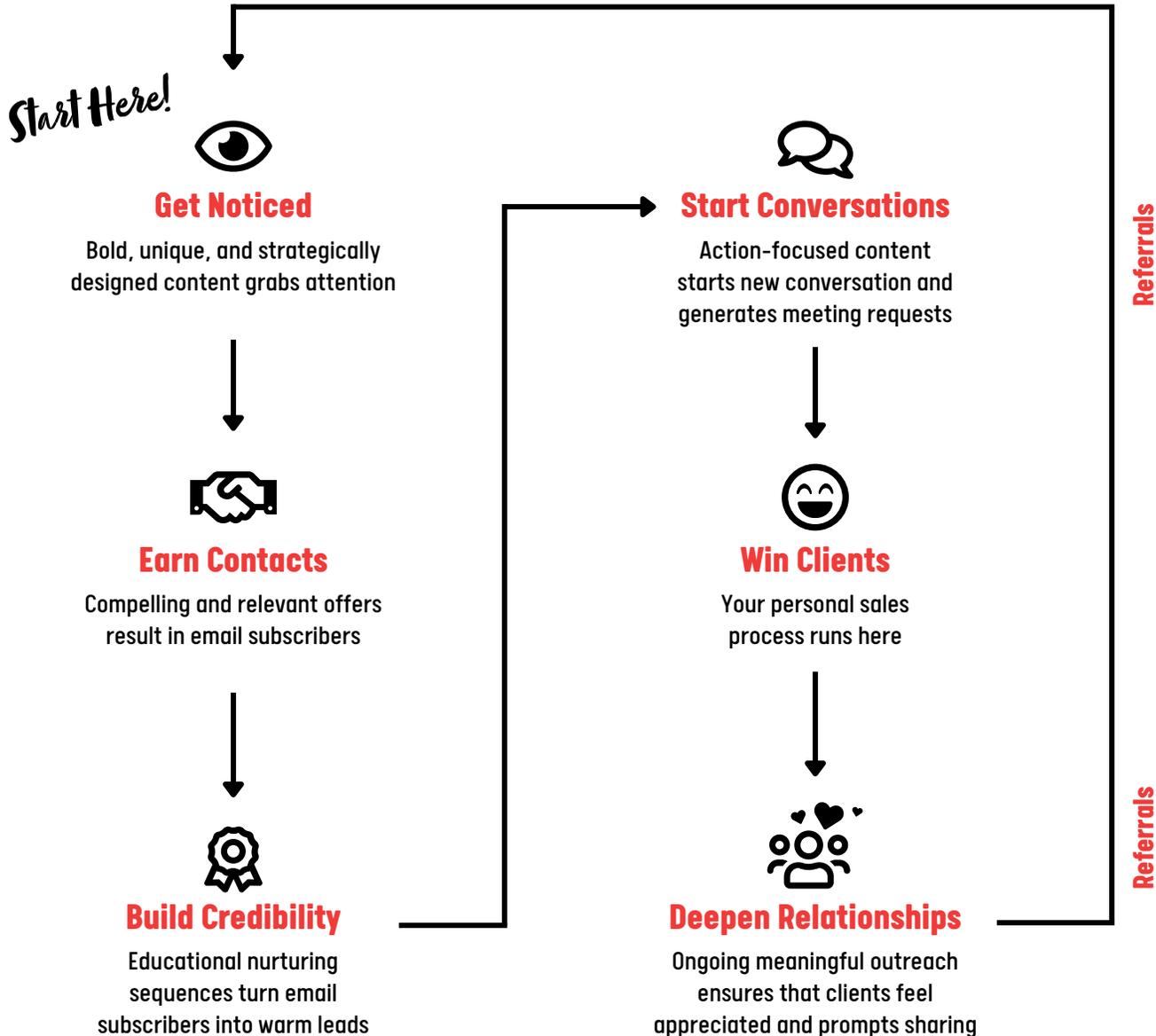
Achieve better results with a **COMPLETE STRATEGY**

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



Market Volatility Reassurance
Personal Connection Video



DIY Email Drip Campaign Builder
Prospect Engagement Campaign



What's Your Investment Mindset?
Visual Insights Newsletter



OR



Travel Safety Tips
Visual Insights Newsletter



Event Follow-Up
Prospect Engagement Campaign



Timely Emails
Launch as soon as possible



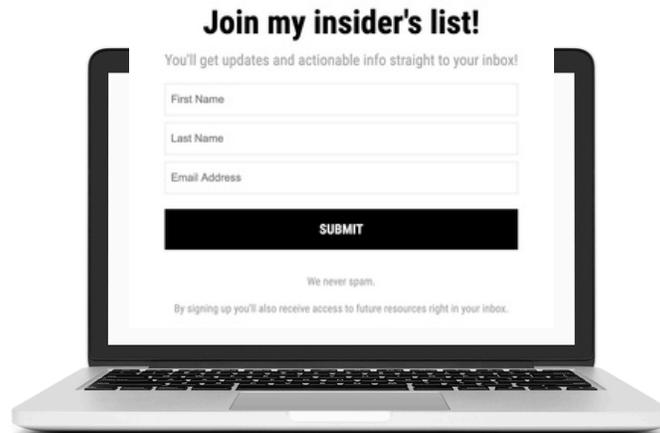
Let's start with the ESSENTIALS

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.

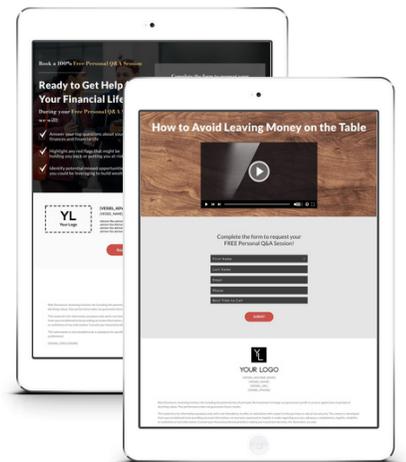
90-Day New Client Onboarding



Website Opt-in Form



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



Coming Soon!

You won't want to miss these dropping soon!



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



Testimonial Campaign Refresh
Client Retention Campaign



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 Father's Day - June 15

Dads are the unsung heroes of so many family decisions - from building backyard forts to building college funds. They're often the ones making financial sacrifices behind the scenes and thinking two steps ahead.

So this Father's Day, I just want to say: thank you. For showing up. For providing. For planning.

If you're a dad trying to make smart money moves for your family's future, I'd love to be in your corner. Whether you need help with saving, investing, or mapping out long-term goals - let's chat.

Call me at **[OFFICE PHONE]** or comment below - I'm here when you're ready.



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.

- Pride Month
- Caribbean-American Heritage Month
- Cancer Survivors Day - June 1
- Shavuot - June 1-3
- D-Day - June 6
- Father's Day - June 15
- Juneteenth - June 19

GATHER 'ROUND

Check out these ideas and use our [Event Planning Checklist](#) in the library to help plan your next event.



Client Appreciation BBQ

Gather your clients for a laid-back afternoon of good food, sunshine, and genuine connection.

This BBQ is all about showing appreciation for the people who make your work meaningful—while creating space to check in, catch up, and enjoy each other's company.

No slideshows. No suits. Just real conversations, lawn games, and a few helpful insights sprinkled in to keep everyone feeling confident about the road ahead.

Sip & Paint (Financial Edition)

Host an easygoing night out where clients can unwind, create something beautiful, and casually catch up on what's happening in the market.

This isn't a seminar—it's a social. But that doesn't mean it can't be meaningful. You'll still share practical insights, answer questions, and remind clients they're on solid footing, no matter what headlines say.

It's about more than art—it's about helping clients feel confident, connected, and cared for.



JUNE 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

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6

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16

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