

# THE MARKETING MIX

May 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.



**Family Wellness Month**



**Mental Health Awareness Month**



**Disability Insurance Awareness Month**

Achieve better results with a

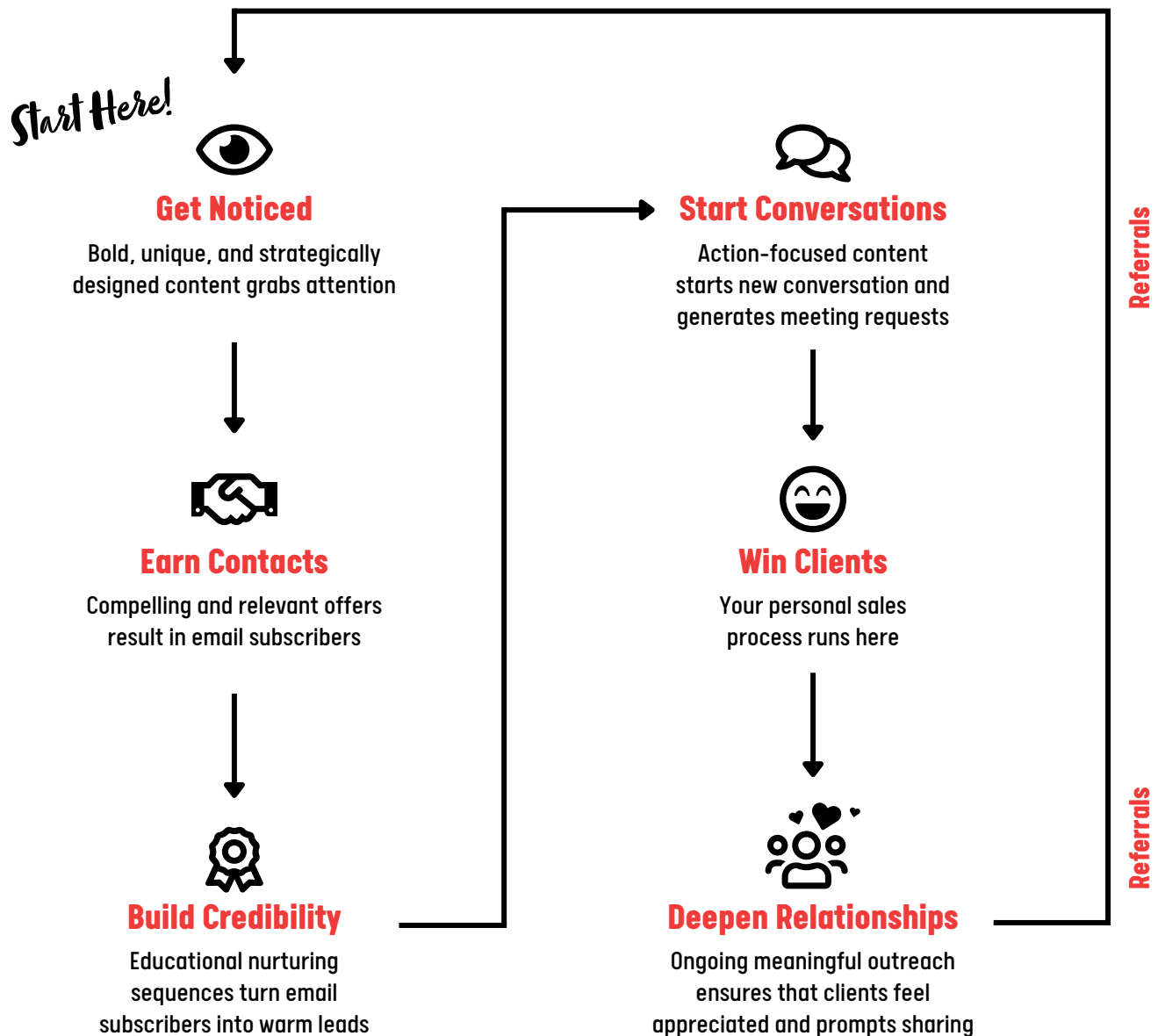
# COMPLETE STRATEGY

*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**



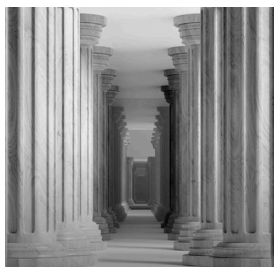
**Deepen Relationships**



**DIY Social Media Campaign**  
Social Prospecting Campaign



**High-Net-Worth Investors**  
Prospect Engagement Campaign



**6 Pillars of Wealth Management for High Net Worth Investors**  
Visual Insights Newsletter



OR



**How Simple Gratitude Practices Can Make Life Better**  
Visual Insights Newsletter



**Timely Emails**  
Launch as soon as possible





# Stay on track even when the GOING GETS TOUGH

*Your  
Volatile Marketing  
Playbook*

Volatile markets bring tough questions and anxious clients—but also opportunity. With the right tools, you can lead with clarity, maintain momentum, and build trust when it matters most. These campaigns equip you to lead with confidence.



**When Markets Wobble, Stay Rooted**  
Timely Email



**Tariffs Trigger Market Slide**  
Timely Email



**How to Weather a Recession**  
Visual Insights Newsletter



**Recession Investing**  
Prospect Engagement Campaign



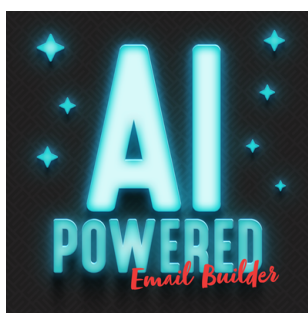
**Investment Opportunities  
in Volatile Markets**  
Prospect Engagement Campaign



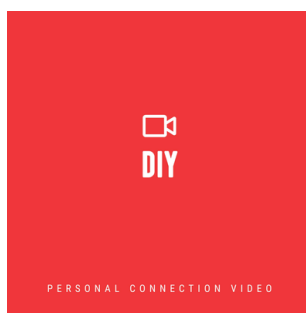
**Investment Opportunities  
in Volatile Markets**  
Lead Generation Campaign

## Want to Create Your Own Commentary?

No worries! We've got a whole set of DIY campaigns ready for you:



**AI-Powered Email Builder**



**DIY**  
Personal Connection Video



**Email Drip Series Builder (14 Weeks)**  
Email Communication

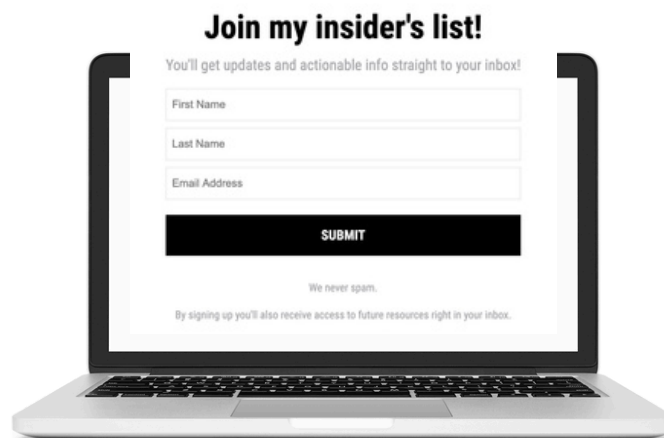
# Let's start with the ESSENTIALS

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!



**DIY Email Drip Campaign**  
Prospect Engagement Campaign



**Event Follow-Up**  
Prospect Engagement Campaign



**Market Volatility Reassurance**  
Personal Connection Video



**What's Your Investment Mindset?**  
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:

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### Post this on Mother's Day - May 11

Let's be honest – moms do a lot. From playdates to grocery lists to those tough financial decisions...

They're often the ones keeping the family budget in check, stretching every dollar, and planning for the future. So today, I just want to say: Happy Mother's Day to all the moms doing the emotional and financial heavy lifting. You're amazing.

If you're a mom who could use some guidance with budgeting, saving, or planning for long-term goals, I'd love to help. Whether it's navigating college costs, retirement strategies, or just figuring out how to make your money work harder – let's chat.

Comment below or give me a call at [OFFICE PHONE] – I'd love to support you.



## 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.

- Kentucky Derby Day - May 3
- Star Wars Day - May 4
- Cinco de Mayo - May 5
- National Nurses Day - May 6
- Armed Forces Day - May 17
- Memorial Day - May 26
- Amnesty International Day - May 28
- National Senior Health and Fitness Day - May 28

# GATHER 'ROUND

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



## **“State of the Market” Town Hall**

Invite your clients to a candid, down-to-earth town hall about today’s market conditions and what they really mean for their financial future.

Share key trends, practical insights, and create space for open Q&A—so clients leave feeling informed, reassured, and confident in their long-term strategy.

Whether they’re feeling uncertain or simply curious, this is a chance to reconnect, refocus, and move forward—together.

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## **Yoga + Meditation Class**

Financial wellness goes beyond dollars and cents—it’s about nurturing your whole self.

Invite your clients to unwind and recharge with a beginner-friendly yoga and meditation class, led by a certified instructor. Through gentle movement, breath work, and meditation, this session helps release stress, boost flexibility, and support mental clarity.

No matter their experience level, this class offers a welcoming environment to feel grounded, calm, and centered.





# MAY MARKETING CALENDAR

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

Monday	Tuesday	Wednesday	Thursday	Friday
			1	2
5	6	7	8	9
12	13	14	15	16
19	20	21	22	23
26	27	28	29	30

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