

THE MARKETING MIX

October 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

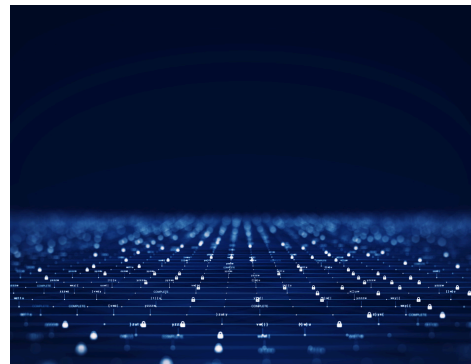
Struggling with creating informative and timely communications? Here are suggested seasonal topics. Creating content around these themes will lead to higher engagement with your audience due to their timeliness!

No time to create your own content?

No problem, check out our suggested ready-to-go campaigns on Page 4.



Financial Planning Month



Cybersecurity Awareness Month



Long-Term Care Planning Month

Achieve better results with a

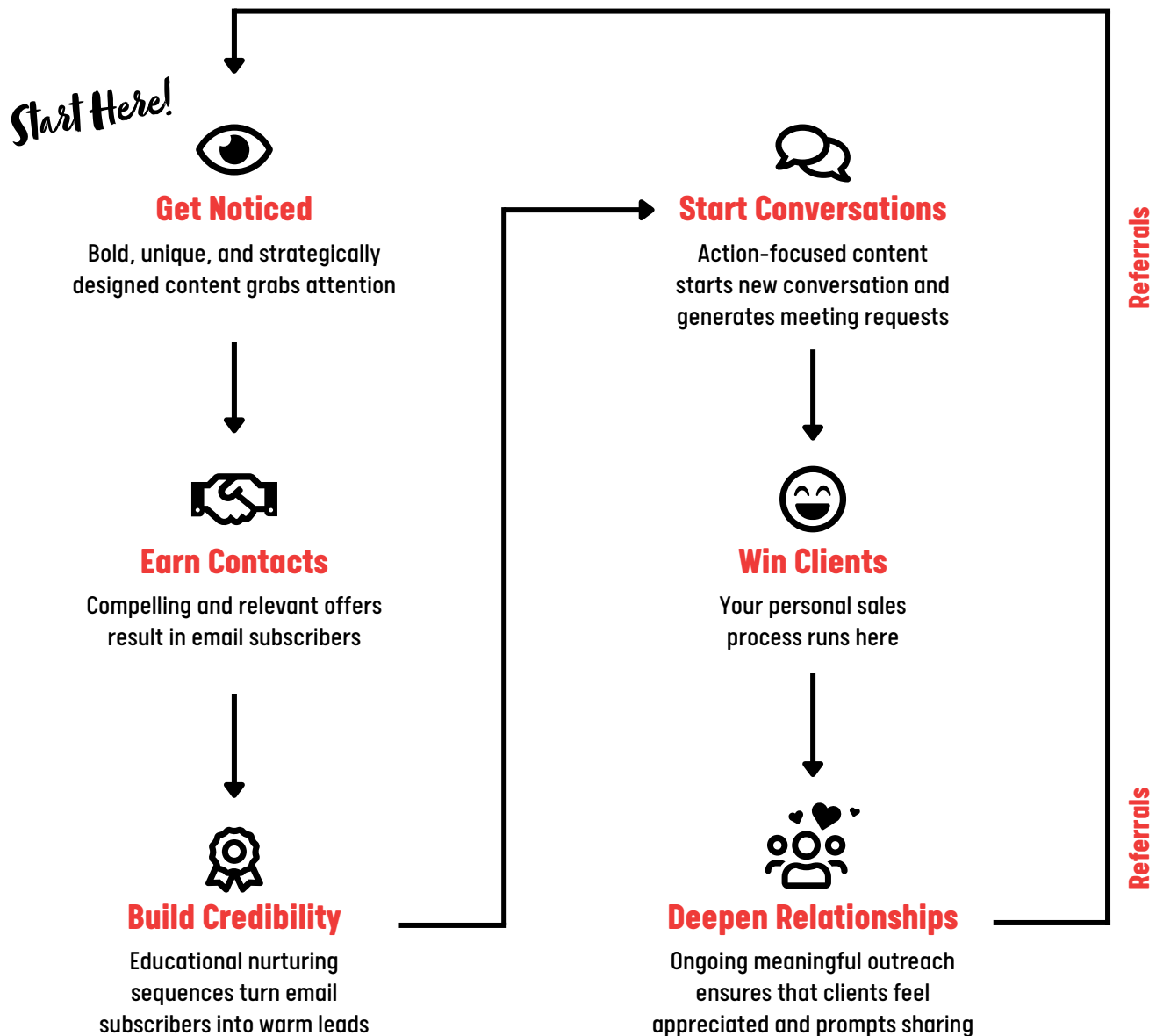
COMPLETE STRATEGY

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!



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



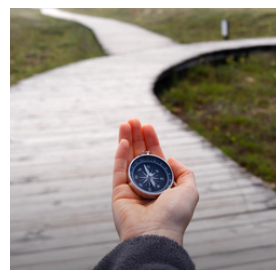
Win Clients



Deepen Relationships



Helping Adult Children with Home Purchases
Personal Connection Video



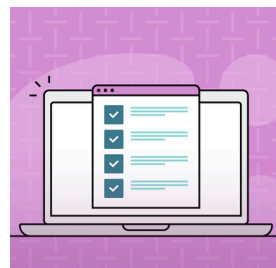
Retirement Income Planning Guide
Lead Generation Campaign



Overlooked Retirement Expenses [And How to Plan for Them]
Visual Insights Newsletter



OR



The Surprising & Undeniable Power of Simple Lists
Visual Insights Newsletter



Q3 2025 Financial Update
Quarterly Financial Update



Scheduled release: 10/8



Timely Emails
Launch as soon as possible



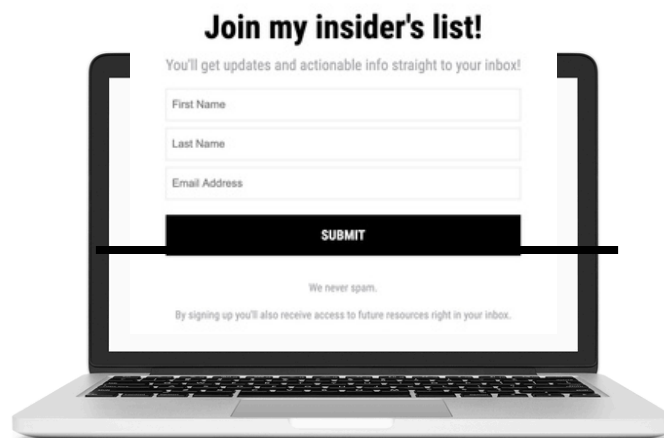
Let's start with the ESSENTIALS

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!

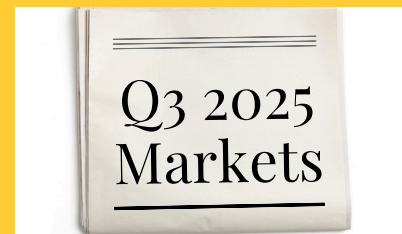
You won't want to miss these dropping soon!



**The Three Types of
Wealth That Define Retirement**
Visual Insights Newsletter



**Medicare
Annual Enrollment**
Lead Generation Campaign



**Q3 2025
Financial Update**
Quarterly Financial Update

GET SOCIAL!

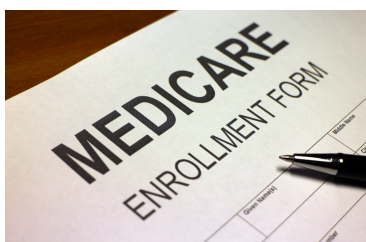
Marketing doesn't start and end with automation. Personal posts are still critical to building those connections.

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 World Mental Health Day - October 10th

Today is World Mental Health Day—a reminder that financial well-being and mental well-being are closely connected. Taking time to check in on yourself and your loved ones is just as important as planning for your financial future. ❤️ [Advisor Name/Your Firm] is here to help you feel confident in both your finances and your peace of mind.



Post this on the start date for Medicare Open Enrollment - October 15th

Medicare Open Enrollment starts October 15! 🕒 This is your yearly opportunity to review your coverage, compare plans, and make changes if needed. Have questions about what's right for you? [Insert call-to-action, e.g., "Schedule a free consultation with me today."]

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.

- Breast Cancer Awareness Month
- Yom Kippur - Oct. 1-2
- World Teachers' Day - Oct. 5
- International Dyslexia Day - Oct. 8
- World Mental Health Day - Oct. 10
- Columbus Day - Oct. 13
- Indigenous Peoples' Day - Oct. 13
- Medicare Open Enrollment Start Date - Oct. 15
- Diwali - Oct. 20
- Halloween - Oct. 31



GATHER 'ROUND

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



Pumpkin Decorating / Carving Contest

Host a festive client event where families can show off their creativity with pumpkins. Whether in person at your office or virtually with photo submissions, it's a lighthearted way to connect outside of formal meetings.

Keep the atmosphere casual with warm cider, treats, and conversations about family milestones, future plans, and building financial confidence.

Bonus: Provide pumpkins and carving kits—or send a gift card for virtual participants—so everyone can join in the fun.

Cybersecurity Awareness Event

October is Cybersecurity Awareness Month—perfect timing to help clients protect more than just their finances. Partner with a local IT expert to walk through common risks, scams, and best practices for staying safe online.

Frame the event as practical and approachable, with clear takeaways on safeguarding accounts, preventing identity theft, and protecting sensitive information.

Bonus: Send clients home with a cybersecurity checklist—or branded password manager subscription—to reinforce the value of the session.



OCTOBER 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
6	7	8	9	10
13	14	15	16	17
20	21	22	23	24
27	28	29	30	31

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