

# THE MARKETING MIX

September 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.



**Life Insurance Awareness Month**



**World Alzheimer's Month**



**Medicare Annual Enrollment Prep**

Achieve better results with a

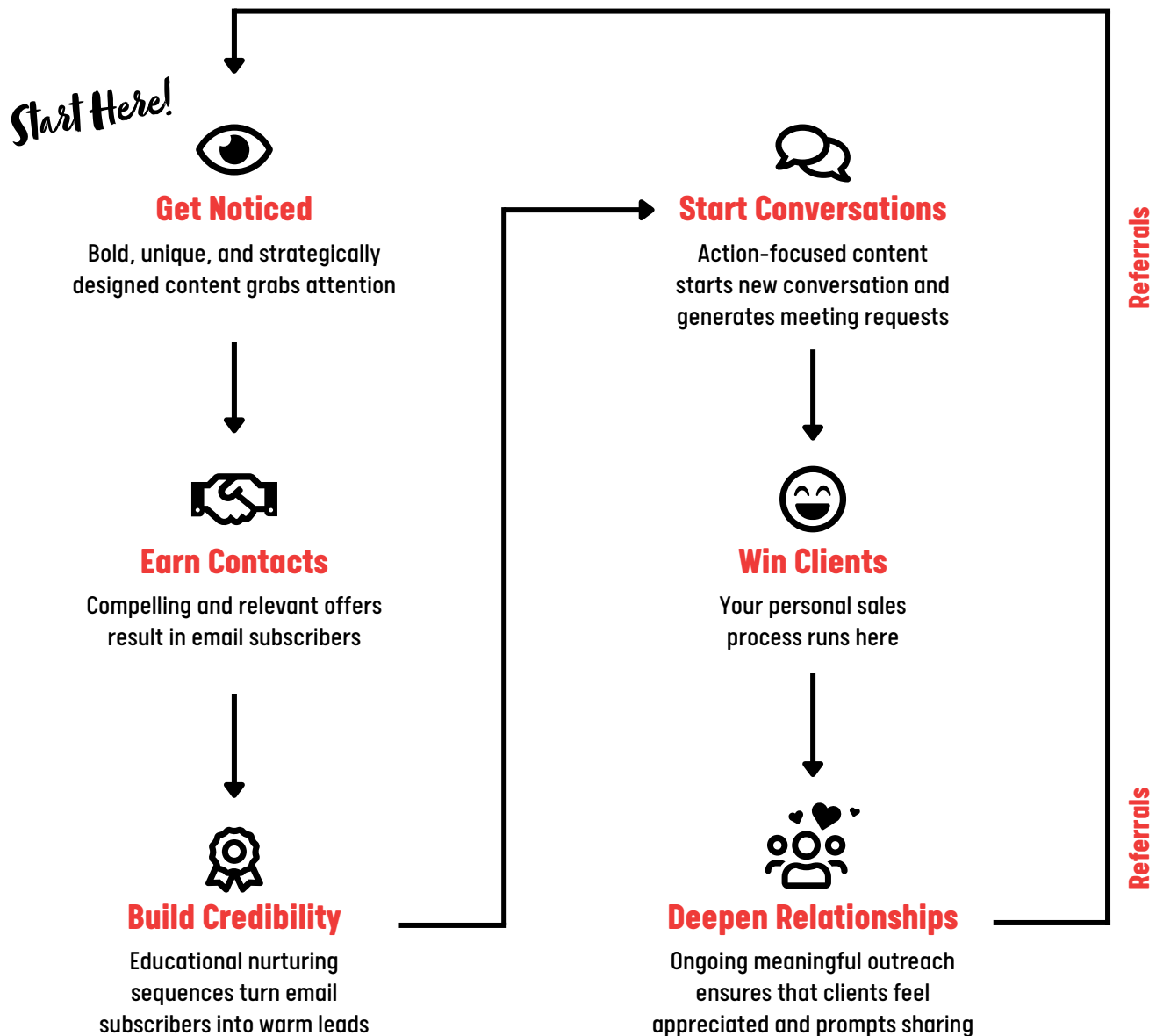
# COMPLETE STRATEGY

*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**



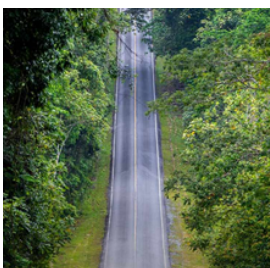
**Tax Changes Ahead:  
7 Updates That May Affect You**  
Personal Connection Video



**Timely Emails**  
Launch as soon as possible



OR



**Why Market Highs Feel So Scary  
(Even When History Says "Relax")**  
Visual Insights Newsletter



**Exploring the Shadows of  
Social Media Finance**  
Visual Insights Newsletter





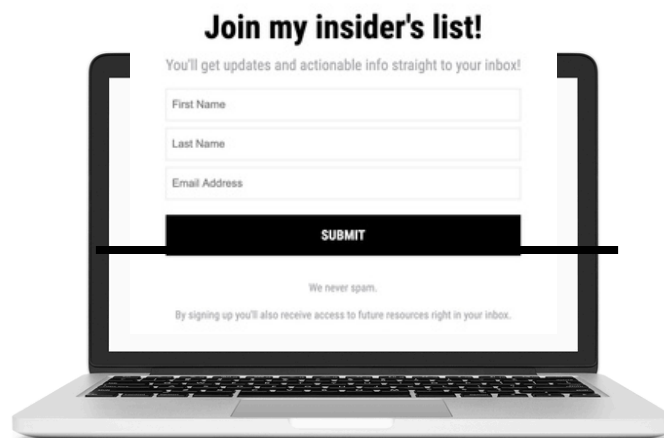
# Let's start with the ESSENTIALS

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!



**Retirement Income  
Planning Guide**  
Lead Generation Campaign



**Helping Adult Children with  
Home Purchases**  
Personal Connection Video



**Overlooked Retirement Expenses  
(And How to Plan for Them)**  
Visual Insights Newsletter

# GET SOCIAL!

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

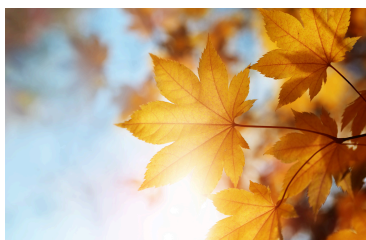
**To do:** Fill in the blanks to help you get started with a social media post. Post alongside a picture of your office, a selfie of you in your favorite spot, or an image that invokes inspiration (think sunset, beach, etc.)

## Social Media Prompt of the Month:

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### Post this on Labor Day - September 1st

Happy Labor Day from all of us at [ADVISOR FIRM NAME]! This holiday is a moment to pause and appreciate the hard work that shapes our lives and communities. As we celebrate, take a moment to reflect: what accomplishment are you most proud of, and what's one goal you're excited to pursue in the months ahead?"



### Post this on the first day of fall - September 22nd

Autumn is a season of transition and growth. 🍁 At [ADVISOR FIRM NAME], we're proud to help our clients build toward their future, one step at a time. What's one milestone you're working toward this fall, and what accomplishment are you most proud of this year?

## 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.

- International Day of Charity - Sept. 5
- National 401(k) Day - Sept. 5
- National Grandparents' Day - Sept. 7
- Patriot Day - Sept. 11
- Start of National Hispanic Heritage Month - Sept. 15
- National Working Parents Day - Sept. 16
- International Day of Peace - Sept. 21
- World Gratitude Day - Sept. 21





# GATHER 'ROUND

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



## Fall Fest: Financial Edition

Host a client event at a local orchard where families can enjoy crisp air, colorful leaves, and fresh apples—without the pressure of a formal seminar.

Focus on relaxed conversations about setting goals, planning for life changes, and making small financial adjustments that add up.

Bonus: Offer a seasonal takeaway—apples, jam, or cider—to make the experience memorable.

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## Medicare Clarity Night

Host a relaxed, informative evening where clients can cut through the confusion before Medicare enrollment begins.

No complicated charts, no sales pitch—just clear guidance, expert insights, and straightforward answers to the questions that matter most.

Clients leave feeling confident, informed, and ready to choose the plan that fits their health, budget, and future goals.



# SEPTEMBER 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	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30			

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