

THE **MARKETING MIX**

February 2023

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!

FEATURED THIS MONTH

Struggling with choosing informative and timely communications? Here's one super easy approach that will help: Seasonal topics and themes. Check out these suggestions:



Senior Independence Month



Recession Survival Strategies



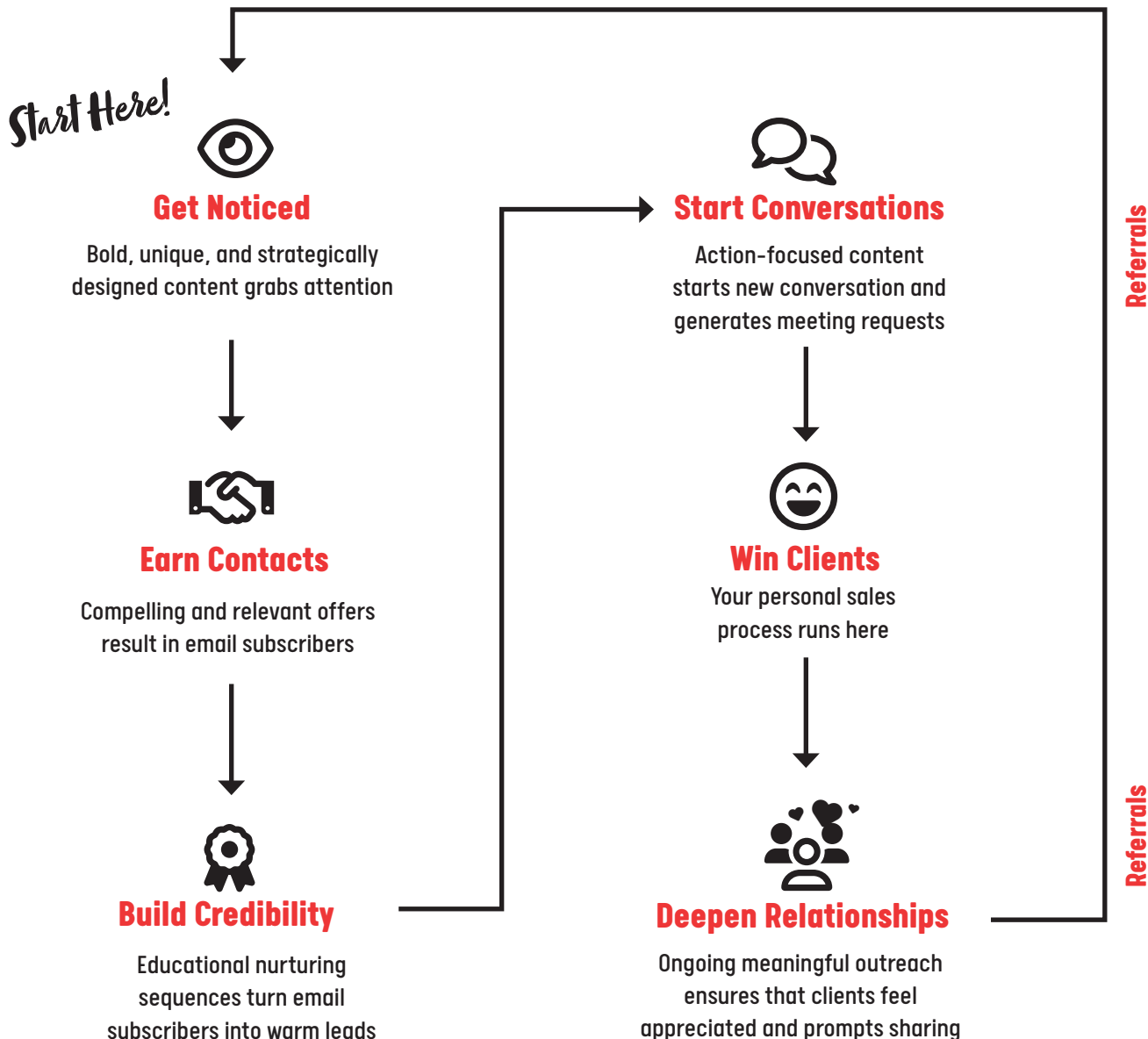
Black History Month

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! Session.

COLD TO GOLD

Just a little reminder :)



Get Noticed



Earn Contacts



Build Credibility



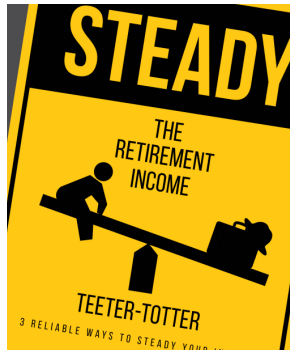
Start Conversations



Win Clients



Deepen Relationships



Retirement Income Teeter-Totter

Lead Generation Campaign



Fresh Start

Visual Insights Newsletter



Recession Investing

Prospect Engagement Campaign



Tax-Loss Harvesting

Personal Connection Video



Be a reassuring presence for **RECESSION MARKETING**

Your Recession Anxiety Playbook

A recession is probable in 2023 and investor anxiety is high. Our research shows that HNW investors are more likely to both leave their current advisor or find a new advisor during these times. That means now is a critical time for advisors to ramp up communication to retain clients and convert new prospects. Our recession-oriented emails and campaigns are designed to help you be reassuring and ever-present to your clients and prospects.



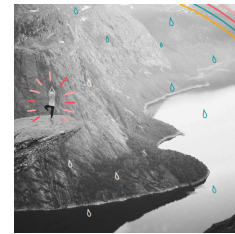
Inflation True/False Quiz
Visual Insights Newsletter



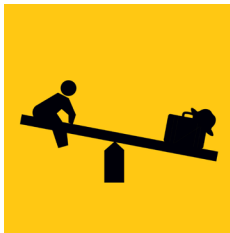
Burnout & Willpower Gap
Visual Insight Newsletter



How to Weather a Recession
Visual Insights Newsletter



Silver Linings of Uncertainty
Visual Insights Newsletter



Retirement Income Teeter-Totter
Lead Generation Campaign



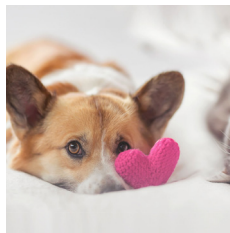
Recession Investing
Lead Generation Campaign



Investor Recovery*
Lead Generation Campaign



Retire Confidently in a Crash
Lead Generation Campaign



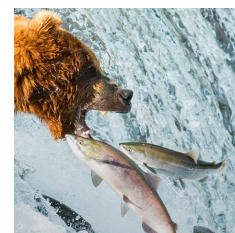
It's Going to Be OK
Timely Email



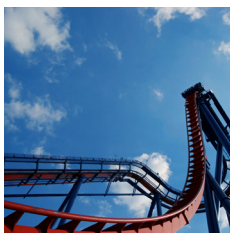
Make Room for Hope
Timely Email



Recession Investing
Prospect Engagement



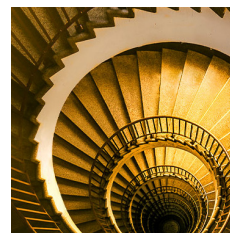
Bear Market Perspective
Personal Connection Video



The End of the World
Personal Connection Video



The Power in Uncertainty
Personal Connection Video



Recession Worries?
Personal Connection Video

STAY TOP OF MIND

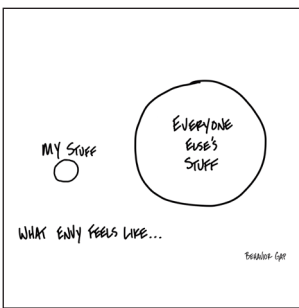
Building a base of loyal clients is one of the most important yet challenging things you can do to grow your business.

Client Focused Campaigns

Communicating with your clients regularly is one of the best ways to stay top of mind, reinforce the value you bring, and drive client loyalty.

Check out our recommendations for client content that will help deepen those relationships.

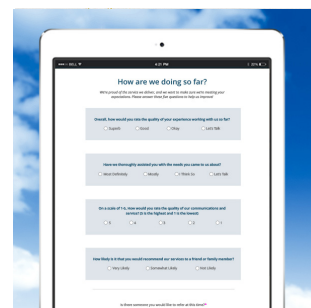
Campaign Suggestions:



Behavior Gap by Carl Richards
(Add On)



VIN: Retirement in 2050
Visual Insights Newsletter



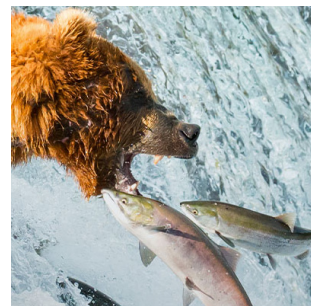
90-day New Client Onboarding
Client Communications



VIN: Inflation True or False Quiz
Visual Insights Newsletter



Avoiding Scams Single Topic Email
Single Topic Email



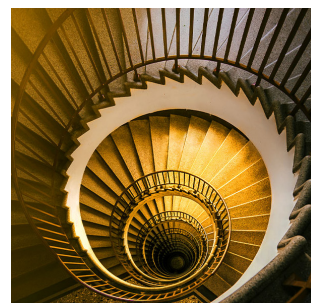
PCV: Bear Market Perspectives
Personal Connection Video



My Why
Personal Connection Video



Small Wins
Timely Email

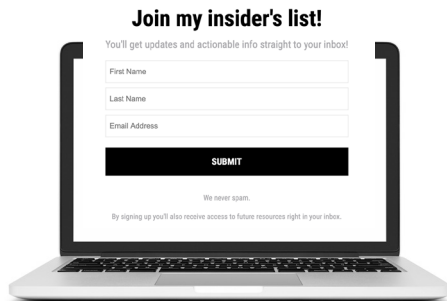


PCV: Recession Worries?
Personal Connection Video

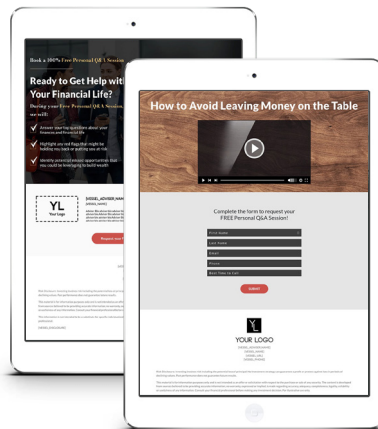
Let's start with the ESSENTIALS

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.

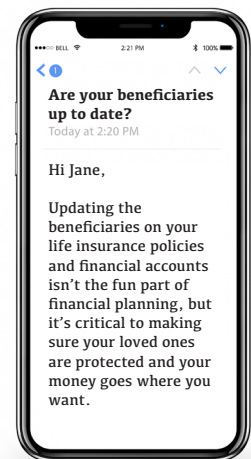
Website Opt In Form



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

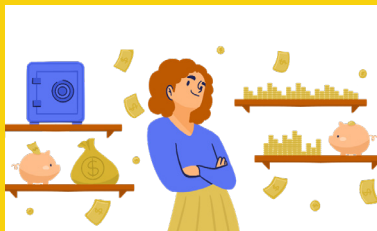


Annual Review Scheduling Email



Coming Soon!

You won't want to miss these dropping next month.



Money Wisdom
Visual Insights Newsletter



Recession Survival Strategies
Lead Generation Campaign

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 on Groundhog Day - February 2nd

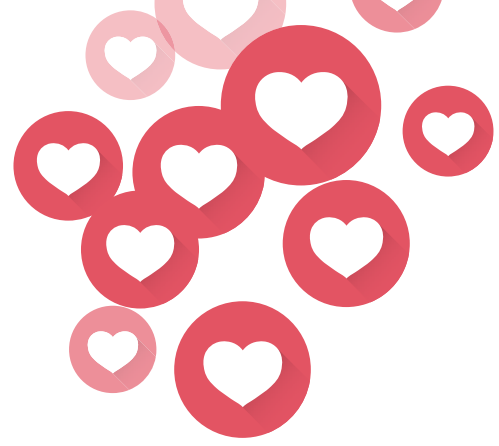
The last few years have felt a bit like one long Groundhog Day – public health crises, geopolitical unrest, and grim economic predictions on repeat. Punxsutawney Phil may not be able to tell us anything about inflation or the markets, but we can shake this feeling of déjà vu. I'm focusing on what IS in my control, regardless of whether this cyclical proverbial "winter" continues. What can YOU control in your life (regardless of predictions from economists, politicians, or famous groundhogs)?

Post on Valentine's Day - February 14th

Valentine's Day is an opportunity for romantic gestures that may not happen in daily life. Financial planning is not quite as sexy as champagne and roses, but it can be an expression of your love. Do your finances support your goals as a couple, not just as two people? Let's evaluate. Take the time for romance (it's important!), then let's talk about aligning your finances to support your life together in the future. Call **[OFFICE PHONE]** to schedule an appointment.

GET SOCIAL!

cont.



Post on Random Acts of Kindness Day - February 17th

Hate and fear may sell newspapers (so to speak), but these headlines don't necessarily reflect our experiences and relationships. We all do our best to be decent people – but we can go above and beyond today on Random Acts of Kindness Day. I'm committed to intentional, active kindness today, like **[PLANNED ACT OF KINDNESS]**. How are you spreading kindness?

Post on Presidents' Day - February 20th

Presidents' Day offers an opportunity not only to honor the Presidents who have shaped the United States from its inception, but to consider our individual roles in the fabric of our families, communities, and nation. George Washington lived by a simple motto: "Deeds, not words." I'm no President, but I find daily inspiration in the mantra: **[PERSONAL MOTTO]**. What are your words to live by?



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.

- World Cancer Day - Feb 4
- Superbowl Sunday - Feb 5
- National Pizza Day - Feb 9
- International Day of Women and Girls in Science - February 11
- Abraham Lincoln's Birthday - Feb 12
- Super Bowl LVII - Feb 12
- Mardi Gras / Fat Tuesday - Feb 21

GATHER 'ROUND

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



Chocolate Making & Tasting Experience

Invite your top clients and their partners to an evening of learning the delectable art of making and tasting chocolate. Partner with a local chocolaterie to co-host your event, to help transform your guests' evening into a delicious experience.

Center of Influence Workshop

Provide value to clients, while establishing relationships with other professionals by planning a workshop hosted by a COI. It could be estate planning with a local estate planning attorney or tax planning with an accountant. In return, you can offer to host a workshop for their clients as well.



FEBRUARY MARKETING CALENDAR

Monday

Tuesday

Wednesday

Thursday

Friday

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