

THE MARKETING MIX

October 2024

3

Seasonal themes
& topics to help

**AMPLIFY YOUR
MARKETING
RESULTS**

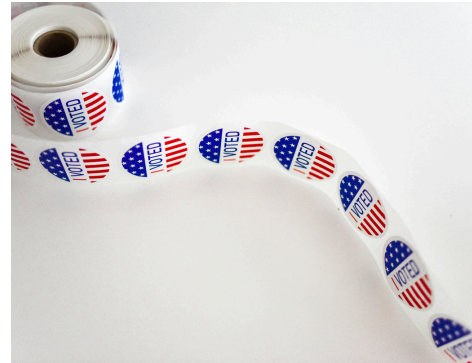
Look inside for more tips!

Cold to Gold Framework | Social Media Prompts | Suggested calendar | 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.



Upcoming US Presidential Election



Financial Planning Month



Long-Term Care Planning Month

Achieve better results with a

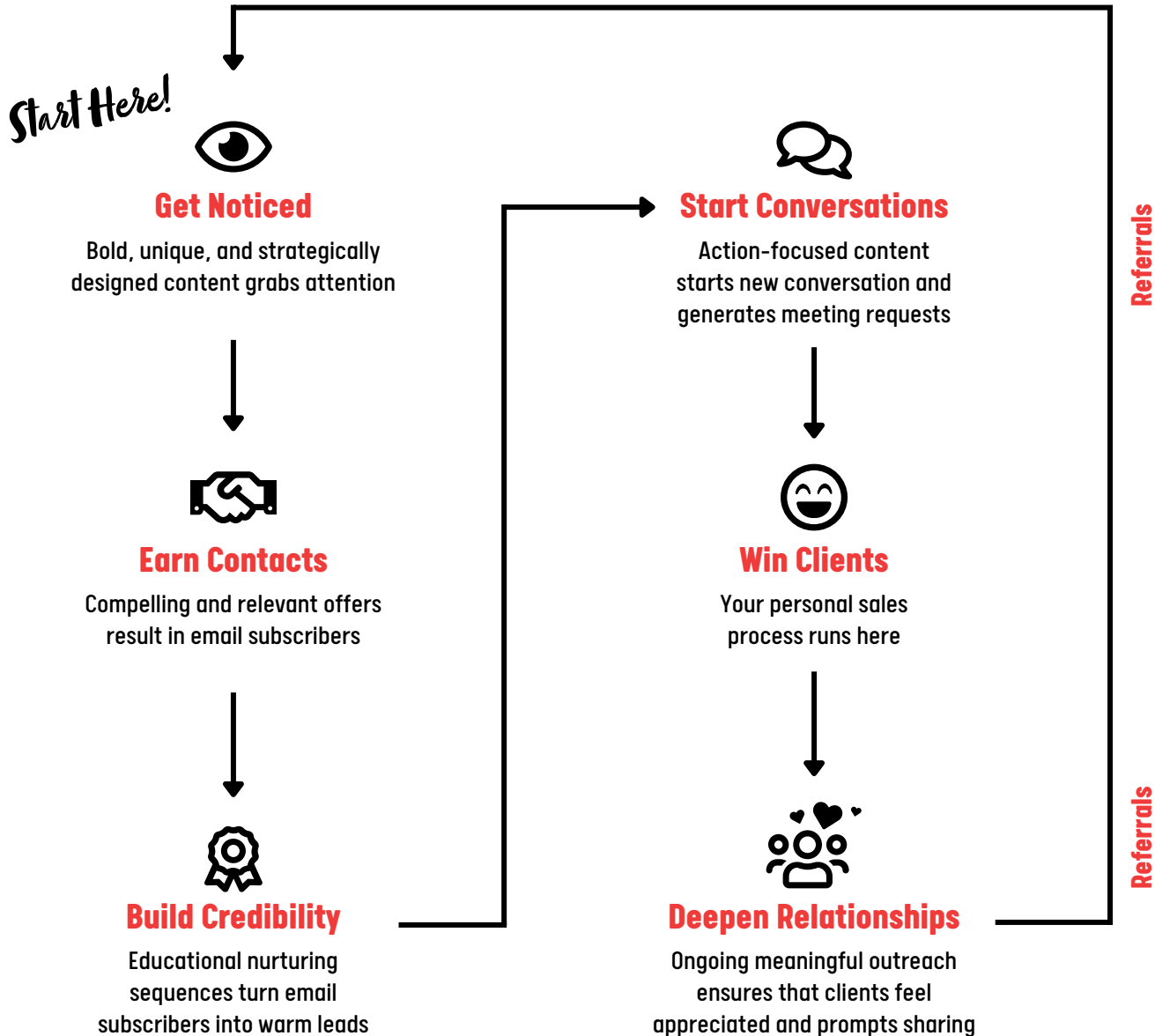
COMPLETE STRATEGY

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!



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](#)

COLD TO GOLD

Just a little reminder :)



Get Noticed



Earn Contacts



Build Credibility



Start Conversations



Win Clients



Deepen Relationships



Q3 2024 Financial Update
Quarterly Financial Update



Scheduled release: 10/11

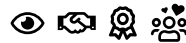


PCV Beyond FOMO: Investing for the Long Term

Personal Connection Video



Inflation Lesson
Visual Insights Newsletter

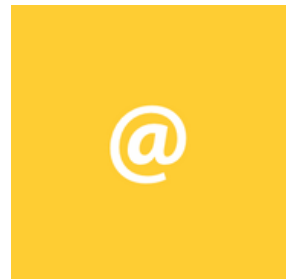


OR



What Happens to the Stock Market During a Presidential Election Year?

Visual Insights Newsletter



Timely Emails

Launch as soon as possible



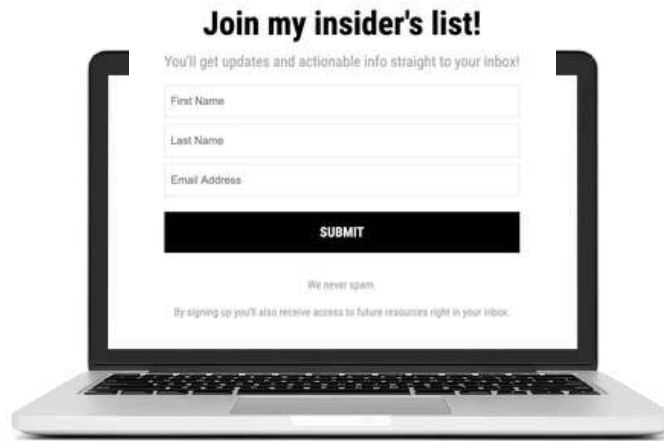
Let's start with the ESSENTIALS

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 in the following weeks.



2024 Medicare Annual Enrollment

Lead Generation Campaign



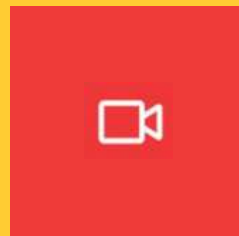
CFP® Client Bill of Rights

Prospect Engagement Campaign



Social Security

Lead Generation Campaign



Reassuring Perspective on Market Corrections

Personal Connection Video



EOY Hidden Tax Opportunities

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:

Post this on World Mental Health Day - October 10

Mental health and financial health are deeply connected. On #WorldMentalHealthDay, we encourage everyone to take care of both. A small step towards organizing your finances can ease stress and create peace of mind. Take care of yourself today and every day.

Post this on Boss's Day - October 16

Happy Boss's Day! I'm reflecting on the incredible impact one of my former bosses had on my growth, both personally and professionally. [Tag your former boss]'s leadership taught me the importance of [list values]. Today, as a [founder/leader of my firm], I strive to carry those lessons forward. A positive work culture starts with trust and respect, and I'm committed to building that every day for my employees.



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.

- Improve Your Office Day - October 4
- International Dyslexia Day - October 8
- World Mental Health Day - October 10
- Yom Kippur - October 11-12
- Breast Cancer Awareness Day - October 13
- Columbus Day - October 14
- Indigenous Peoples' Day - October 14
- Boss's Day - October 16
- Diwali - October 31
- Halloween - October 31

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	4
7	8	9	10	11
14	15	16	17	18
21	22	23	24	25
28	29	30	31	

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