

M A Y 2 0 2 6

# MARKETING PLAN



3

Seasonal themes  
& topics to help

**AMPLIFY YOUR  
MARKETING  
PLAN RESULTS**

**Look Inside for More Tips!**

Lead Lifecycle

Social Media Prompts

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.

1

**Family Wellness Month**



2

**Mental Health Awareness Month**



3

**Older Americans Month**



# COMPLETE STRATEGY

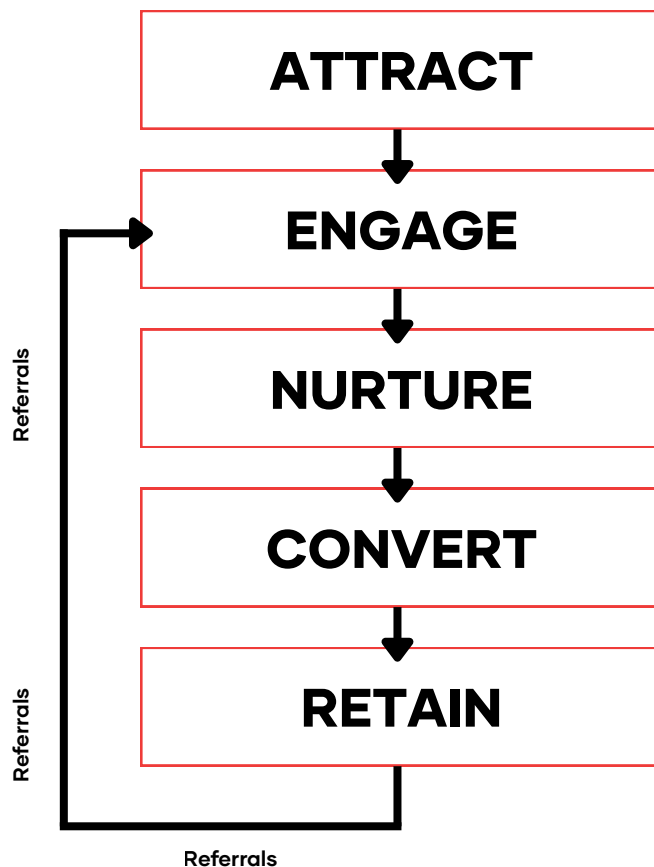
## THE LEAD LIFECYCLE

The Lead Lifecycle is the step-by-step journey from cold to client.

Advisors are great at building relationships in “the real world.” But the digital world is more complex. It’s easy to skip steps or get this wrong.

**The Lead Lifecycle will help you guide your audience through early trust-building stages, and later conversion stages.**

Every piece of content in your marketing plan is built on this strategic approach.



# CAMPAIGNS

Jumpstart the month with these 6 campaigns!

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 during our Launch It! Marketing Plan Workshop. [Register Here.](#)

Core Audience Segments:



Clients



All Prospects



Cold Prospects



Warm Prospects



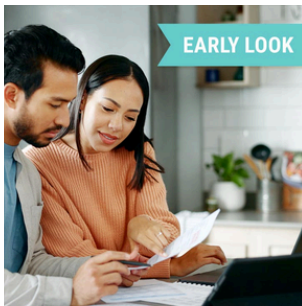
Hot Prospects



Gold Prospects

## RETIREMENT ALIGNMENT FOR COUPLES

Prospect Engagement Campaign



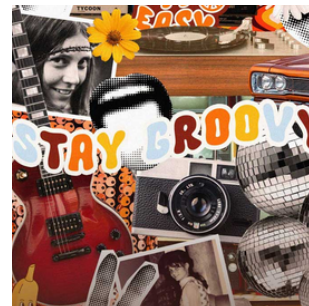
## TIME, DISCIPLINE, AND THE LONG GAME

Visual Insights Newsletter



## HOW LONGEVITY CAN IMPACT RETIREMENT

Visual Insights Newsletter



## TIMELY EMAILS

Launch ASAP



## LIVING INHERITANCE

Personal Connection Video



## SOCIAL SECURITY

Lead Generation Campaign



Disclaimer: Content availability on enterprise platforms is dependent on enterprise approval.

# 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.

1



**90-Day New Client Onboarding**

## Coming Soon!

You won't want to miss these dropping soon.



**SOCIAL SECURITY TAXATION**

Personal Connection Video



**NATIONAL 529 COLLEGE SAVINGS PLAN DAY**

Single Topic Email

2



**Website Opt-in Form**



**MEMORIAL DAY & MOTHER'S DAY**

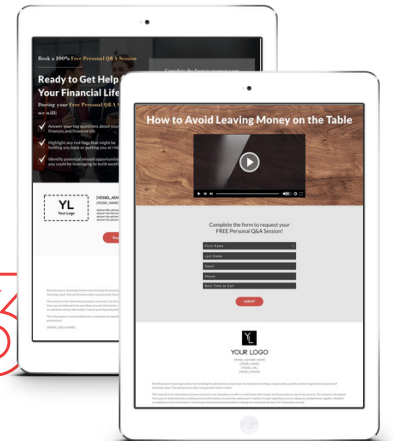
Holiday Emails



**THE ESTATE PLAN THAT BACKFIRES**

Visual Insights Newsletter

3



**8-Week Prospect Nurturing Campaign**

(with or without video)

# GET SOCIAL

Post this any time in May

Retirement isn't the end—it's a new chapter.

Whether it's travel, family time, or giving back, planning helps make it possible.

This Older Americans Month, we're celebrating clients living their next chapter with confidence.

[Optional: Insert client story]

## SOCIAL MEDIA PROMPTS OF THE MONTH:

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.)

Moms are the CEOs of the household—and the heart behind every plan. From daily finances to long-term goals, their impact is incredible.

This Mother's Day, we celebrate the moms who do it all.

If your family's future is on your mind, we're here to help.

[CTA: [Connect](#) / [Book a planning session](#)]

Post this on Mother's Day - 05/10

When was the last time you checked in on your financial stress?

Money can be one of the biggest sources of anxiety—but it doesn't have to be.

This Mental Health Awareness Month, we're reminding our clients that your financial plan should bring clarity—not confusion.

If you've been feeling overwhelmed, let's simplify things together.

[Call to action: [Book a quick check-in](#)]

Post this any time in May

## 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.

May 2  
Kentucky Derby Day

May 4  
Star Wars Day

May 5  
Cinco de Mayo

May 6  
National Nurses Day

May 16  
Armed Forces Day

May 25  
Memorial Day

May 27  
National Senior Health and Fitness Day

May 28  
Amnesty International Day

# EVENT PLANNING

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



## MOTHER'S DAY TEA OR BRUNCH

Celebrate Mother's Day with light refreshments, spring décor, and an invitation for clients to bring their mothers, daughters, or another special guest.

Clients can enjoy a warm, social gathering while advisors create space for easy conversation and relationship-building. Add flowers, a small gift, or a photo moment to make it feel extra special.

A thoughtful way to celebrate clients and create memorable multigenerational connections.

**Best for:** Mother's Day, client appreciation events, referral-friendly events



## SCAM PREVENTION WORKSHOP

Offer a workshop focused on helping older adults recognize fraud, avoid phishing attempts, protect personal information, and stay alert to common financial scams.

Clients can attend an educational session led by the advisor and a local expert, such as an elder law attorney, cybersecurity professional, or community banker. Include a takeaway checklist or resource guide for added value.

A timely way to build trust and spark meaningful family financial planning conversations.

**Best for:** Older Americans Month, client education events, community outreach

# MAY

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

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29