

# THE **MARKETING MIX**

September 2024

# 3

Seasonal themes  
& topics to help

**AMPLIFY YOUR  
MARKETING  
RESULTS**

Look inside for more tips!

Cold to Gold Framework

Social Media Prompt

Suggested Calendar

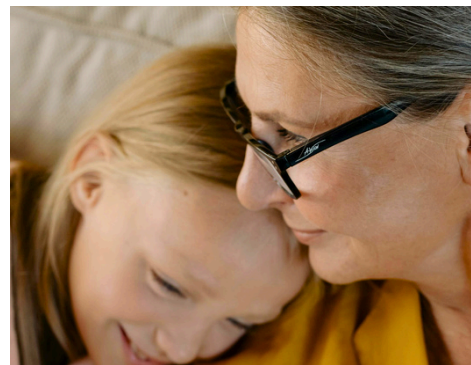
and more!

# 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:



**National Hispanic Heritage Month**



**National Life Insurance Awareness Month**



**World Alzheimer's Month**

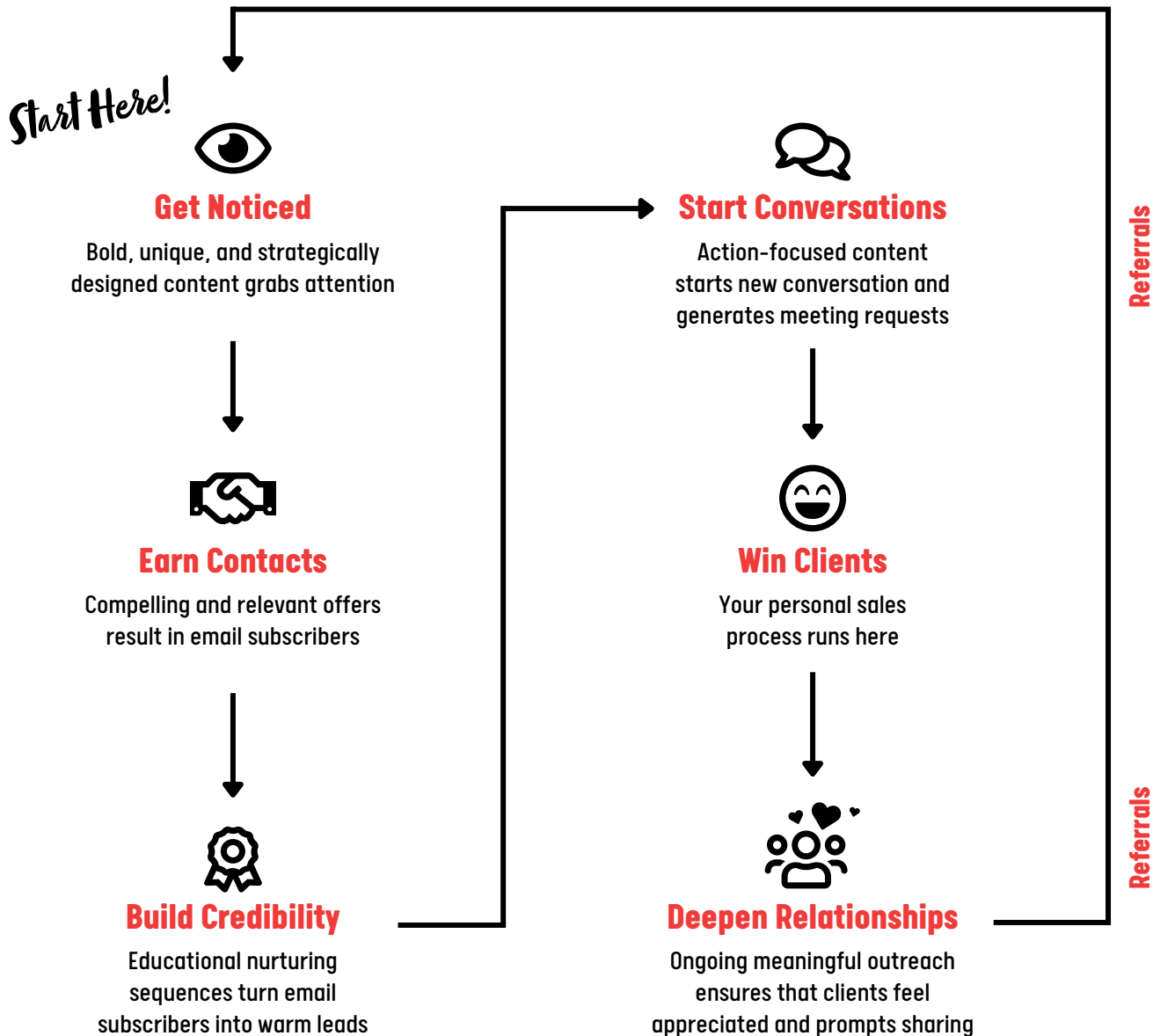
# Achieve better results with a **COMPLETE STRATEGY**

*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**

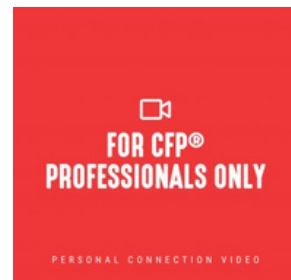


**Deepen Relationships**



**INVESTMENT RECOVERY**  
PROSPECT ENGAGEMENT CAMPAIGN

**Investment Recovery**  
Prospect Engagement Campaign



**For CFP® Professionals Only**  
Personal Connection Video



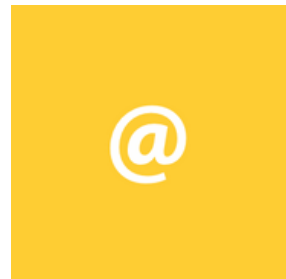
**ANNUAL CLIENT REVIEW**  
SINGLE EMAIL

**Annual Client Review**  
Single Email



**DEBUNKING INVESTMENT MYTHS:  
WHAT DOESN'T DRIVE RETURNS**  
VISUAL INSIGHTS NEWSLETTER

**Debunking Investment Myths:  
What Doesn't Drive Returns**  
Visual Insights Newsletter



**Timely Emails**  
Launch as soon as possible



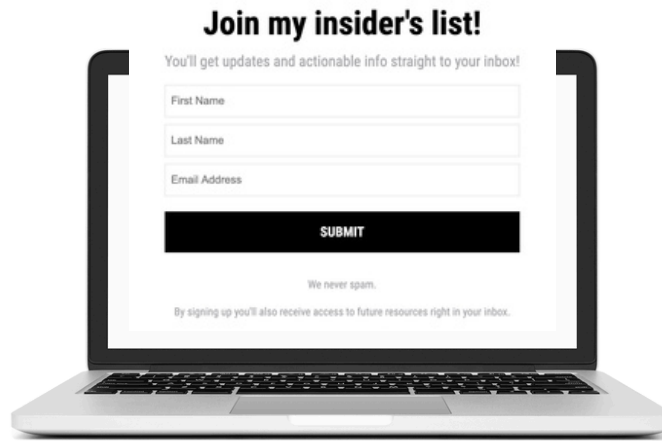
# Let's start with the ESSENTIALS

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.

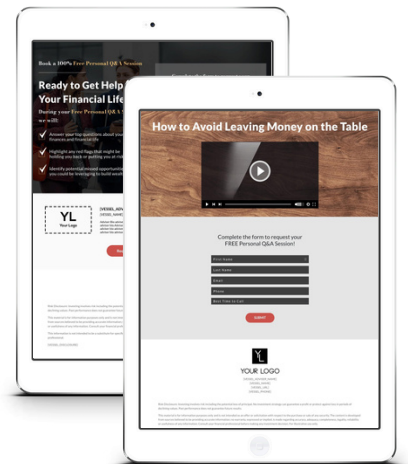
## 90-day New Client Onboarding



## Website Opt-in Form



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



*Coming Soon!*

You won't want to miss these upcoming campaigns.



**Inflation Lesson**  
Visual Insights Newsletter



**Beyond FOMO: Investing for the Long Term**  
Personal Connection Video



**2024 Medicare Annual Enrollment**  
Lead Generation Campaign

# GET SOCIAL!

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

## **Post this on Labor Day - September 2**

Wishing everyone a happy and restful Labor Day! You've worked hard all year—now's the time to unwind and reflect on all you've achieved. Remember that your efforts are not just about today, but about creating a secure and prosperous future. Let's continue to work together to ensure that your hard work leads to the financial success you deserve!

## **Post this on National 401(k) Day - September 6**

It's National 401(k) Day! Your 401(k) is one of the most important tools you have for securing a comfortable retirement. Take some time to review your contributions and consider increasing them if possible. Even small increases can make a big difference over time. Let's work together to ensure that your retirement savings are on the right track and that you're making the most of this valuable benefit. Contact our office today if you need more guidance.

## **Post this on World Gratitude Day - September 21**

Happy World Gratitude Day! Today, I'm thankful for so many things, such as **[LIST THINGS THAT YOU'RE GRATEFUL FOR]**. I also want to take this opportunity to appreciate all my clients who make my work so rewarding. Thank you for trusting me to guide your financial journeys!

Friends, what are you grateful for 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.

- Labor Day - September 2
- International Day of Charity - September 5
- National 401(k) Day - September 6
- National Grandparents' Day - September 8
- Patriot Day - September 11
- Start of National Hispanic Heritage Month - September 15
- National Working Parents Day - September 16
- International Day of Peace - September 21
- World Gratitude Day - September 21
- Fall Equinox / First Day of Fall - September 22

# SEPTEMBER MARKETING CALENDAR

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

Monday	Tuesday	Wednesday	Thursday	Friday
2	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
30				

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