

AUGUST 2026

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

**Black
Business
Month**



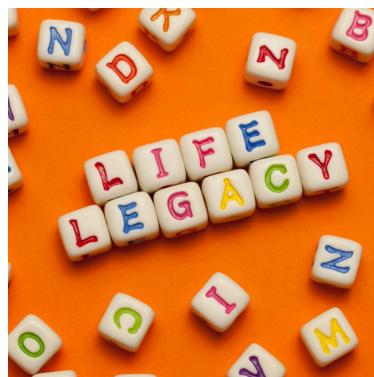
2

**Back to
School
Month**



3

**What Will Be
Your Legacy
Month**



COMPLETE STRATEGY

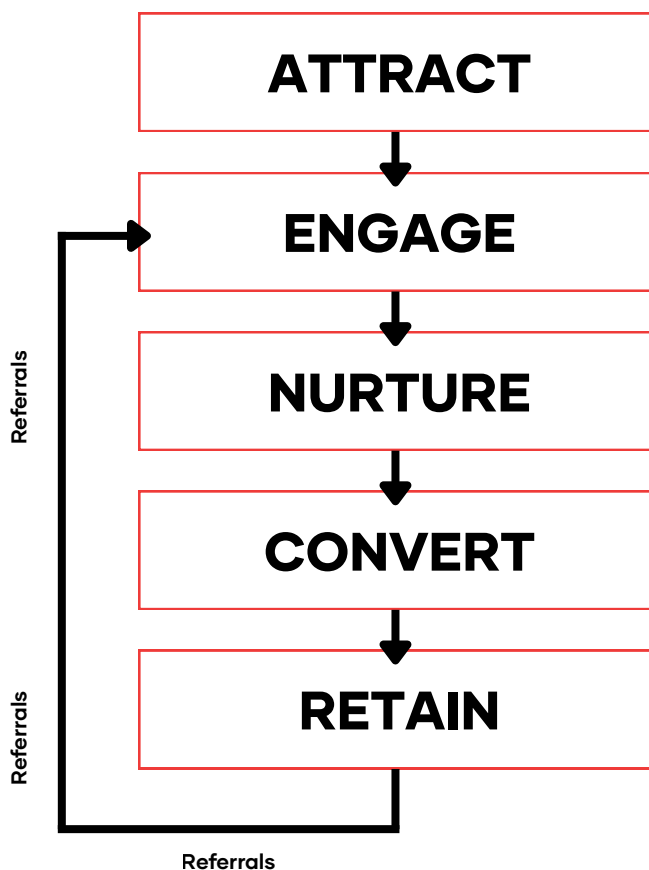
THE LEAD LIFECYCLE

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



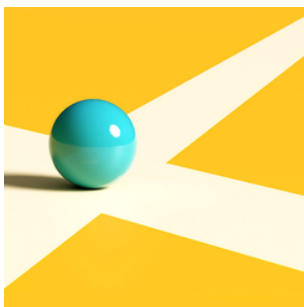
Hot Prospects



Gold Prospects

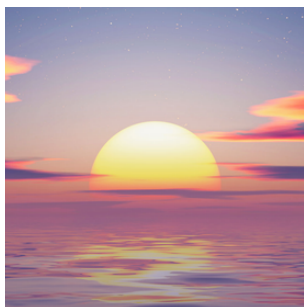
THE HUMAN SIDE OF RETIREMENT PLANNING

Prospect Engagement Campaign



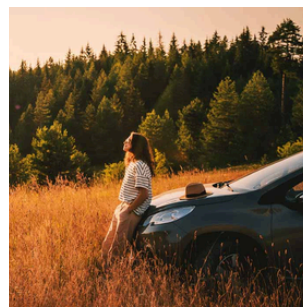
RETIREMENT, REINVENTED

Visual Insights Newsletter



BUILDING YOUR BUSINESS LEGACY

Visual Insights Newsletter



OR

Q2 2026 QUARTERLY FINANCIAL UPDATE

Quarterly Financial Update



TIMELY EMAILS

Launch ASAP



WHAT FAMILIES NEED TO KNOW ABOUT TRUMP ACCOUNTS

Single Email



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.

Coming Soon!

You won't want to miss these dropping soon.



THE ORDER YOUR MONEY SHOULD WORK IN

Personal Connection Video



THE ISO EXERCISE DECISION

Prospect Engagement Campaign



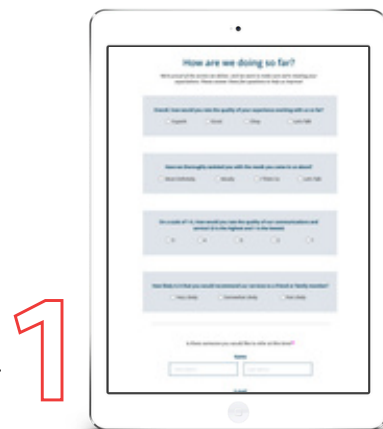
LABOR DAY

Holiday Email



THE MONEY STACK: WHERE SHOULD YOUR NEXT DOLLAR GO?

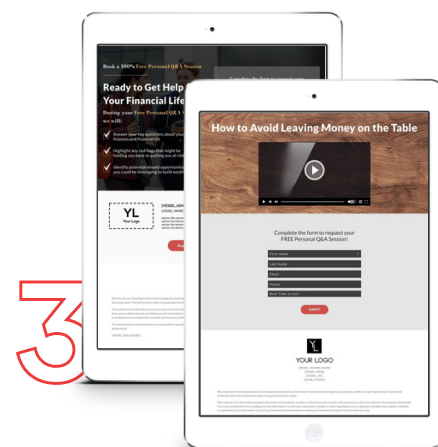
Visual Insights Newsletter



90-Day New Client Onboarding



Website Opt-in Form



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

GET SOCIAL

Post this any
time in August

Back-to-school isn't just for students.
It's a reminder that learning, and planning,
never stops.
If it's been a while since you reviewed your
financial plan, now is a great time.

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

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.)

August is **National Financial Awareness
Month**.

A quick financial check-in today can make a
big difference tomorrow.

Is your financial plan still aligned with your
goals?

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

Post this any
time in August

This month is a great reminder to recognize the entrepreneurs,
business owners, and leaders who help strengthen our
communities every day.

I'm grateful for the opportunity to work alongside so many
incredible clients and local businesses who are building something
meaningful.

Who is a Black-owned business in our community that deserves a
shoutout? Tag them below.

Post this any
time in August

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.

**National Black
Business Month**

August 1
**World Lung
Cancer Day**

August 9
Book Lover's Day

August 14
**National
Financial
Awareness Day**

August 21
**National Senior
Citizens Day**

August 26
**Women's
Equality Day**

EVENT PLANNING

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



BACK-TO-SCHOOL FOR GROWN-UPS

School is back in session, but financial education doesn't end after graduation.

Host a "Back-to-School for Grown-Ups" workshop where clients can refresh their financial knowledge, ask questions, and learn practical strategies for navigating today's financial landscape.

Whether discussing retirement, investing, or planning for future milestones, this event offers a welcoming environment to strengthen relationships while helping clients feel more informed and prepared.



WINE DOWN SUMMER HAPPY HOUR

End the summer on a high note with a casual client appreciation happy hour. Invite clients to unwind over a glass of wine while enjoying great conversation in a relaxed setting.

Skip the formal presentation and focus on reconnecting, catching up, and strengthening relationships before the busy fall season begins.

It's an easy, low-pressure way to stay top of mind while creating memorable client experiences.

AUGUST

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

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
3	4	4	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28
31				