

DECEMBER 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!

FEATURED

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 End of Year Planning



2 Tax Strategy



3 National Giving Month



COMPLETE STRATEGY

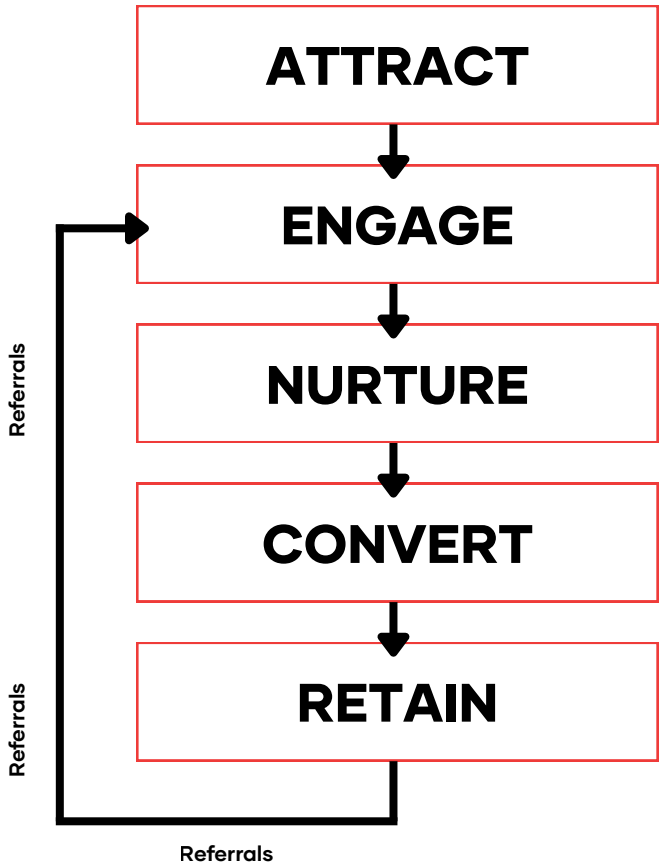
THE LEAD LIFECYCLE

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

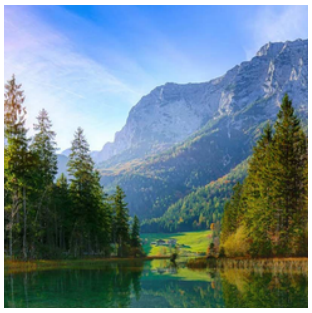
WHO PAYS FOR LONG-TERM CARE?

Prospect Engagement Campaign



CHARITABLE GIVING DESERVES A PLAN

Visual Insights Newsletter



OR

THE ANTI-REGRET PLAYBOOK

Visual Insights Newsletter



GENERAL WINTER & CHRISTMAS

Holiday Emails



TIMELY EMAILS

Launch ASAP



THE ART OF SPECIFICITY

Ready Video



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.



EOY CLIENT LETTER

Single Email



AI FRAUD & IDENTITY THEFT COVERAGE

Single Email



NEW YEAR'S DAY

Holiday Email



THE STRUGGLE TO SPEND IN RETIREMENT

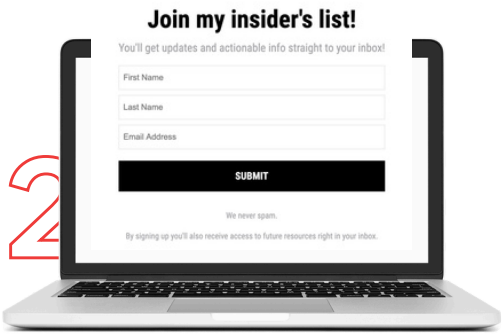
Visual Insights Newsletter

1



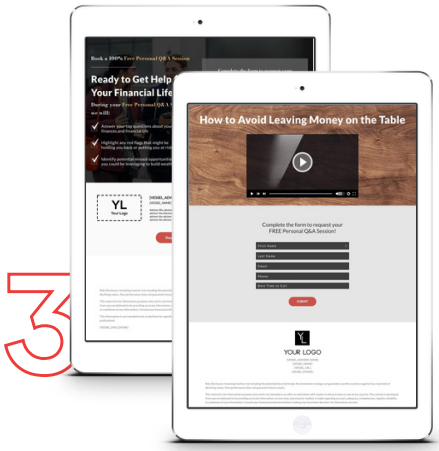
90-Day New Client Onboarding

2



Website Opt-in Form

3



8-Week Prospect Nurturing Campaign

(with or without video)

GET SOCIAL

Post this for Hanukkah [December 4-12]

Wishing a happy Hanukkah to everyone celebrating in **[LOCATION]**! 🕎

May these eight nights bring light, joy, and meaningful moments with loved ones.

What's your favorite Hanukkah tradition?

Post this on Christmas Eve or Day [December 24/25]

Merry Christmas from **[MY FAMILY / OUR TEAM]** to yours! 🎄

Wishing you a holiday filled with love, laughter, and the traditions that make this season special.

What's your favorite Christmas tradition?

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.)

Post this on New Year's Eve [December 31]

Cheers to 2026! ✨

I'm grateful for **[FAVORITE MEMORY / MILESTONE]** and everyone who made this year special.

Here's to new opportunities and meaningful moments in 2027!

What are you looking forward to in the new year?

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.

December 1
World AIDS Day

December 3
International Day of Persons with Disabilities

December 4-12
Hanukkah

December 23
Festivus

December 24
Christmas Eve

December 25
Christmas Day

December 26-January 1
Kwanzaa

December 31
New Year's Eve

EVENT PLANNING

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



CLIENT APPRECIATION EVENT

Celebrate the season with the people who make your business special.

Host a holiday gathering at a local restaurant, café, or event space where clients can connect, enjoy refreshments, and feel appreciated.

It's a great opportunity to say thank you and end the year on a high note.



COMMUNITY GIVING EVENT

Bring clients, families, and your team together to make a difference this season.

Host a donation drive, volunteer at a local organization, or sponsor a community initiative.

It's a great way to strengthen relationships while making a positive impact close to home.

DECEMBER

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

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
	Personal Social Media Post 1	Charitable Giving Deserves a Plan or The Anti-Regret Playbook VIN Email 1 2	3	The Art of Specificity Ready Video 4
Who Pays For Long-Term Card? Prospect Engagement Campaign Email 1 7	Personal Social Media Post 8	Charitable Giving Deserves a Plan or The Anti-Regret Playbook VIN Email 2 9	Timely Email [TBD] 10	11
Who Pays For Long-Term Card? Prospect Engagement Campaign Email 2 14	Personal Social Media Post 15	Charitable Giving Deserves a Plan or The Anti-Regret Playbook VIN Email 3 16	Timely Email [TBD] 17	18
Who Pays For Long-Term Card? Prospect Engagement Campaign Email 3 21	Personal Social Media Post & General Winter Holiday Email 22	Charitable Giving Deserves a Plan or The Anti-Regret Playbook VIN Email 4 [optional] 23	24	Christmas Holiday Email 25
Who Pays For Long-Term Card? Prospect Engagement Campaign Email 4 28	Personal Social Media Post 29	30	31	