

J U L 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

**Summer Celebrations**



2

**Pre-Retirement Planning**



3

**College Planning**



# COMPLETE STRATEGY

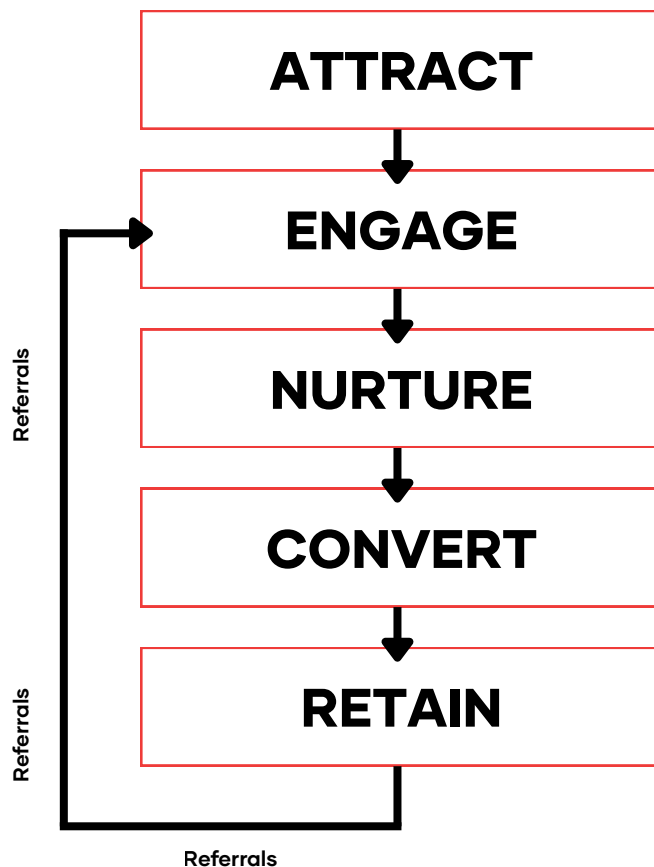
## THE LEAD LIFECYCLE

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

**5 FINANCIAL QUESTIONS FOR THE SUMMER**

Single Email



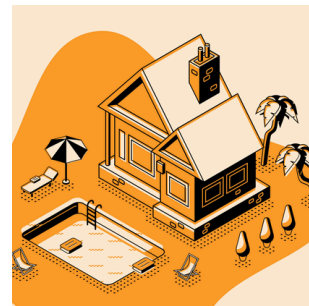
**THE BORING BUSINESS BOOM**

Visual Insights Newsletter



**HOW TO CHOOSE THE BEST PLACE TO RETIRE**

Visual Insights Newsletter



OR

**THE ROTH IRA 5-YEAR RULE EXPLAINED**

Personal Connection Video



**TIMELY EMAILS**

Launch ASAP



**PRE-RETIREE PORTFOLIO REVIEW**

Prospect Engagement



*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.



**Q2 2026 QUARTERLY FINANCIAL UPDATE**

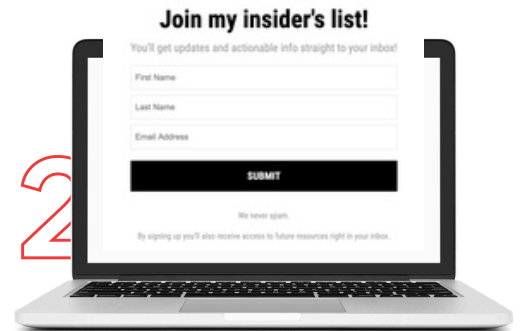
Quarterly Financial Update



**THE HUMAN SIDE OF RETIREMENT PLANNING**

Prospect Engagement Campaign

2



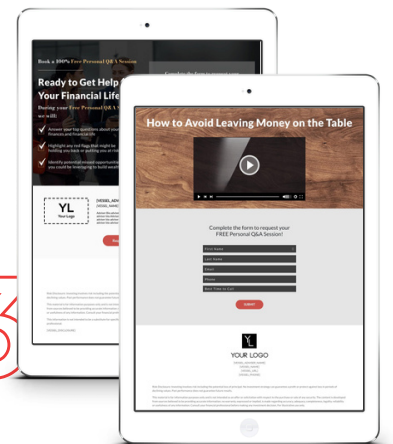
**Website Opt-in Form**



**RETIREMENT, REINVENTED**

Visual Insights Newsletter

3



**8-Week Prospect Nurturing Campaign**

(with or without video)

# GET SOCIAL

Happy Fourth of July!

Today, we're reminded that independence is something worth planning for.

Whether it's retiring on your own terms, supporting family, or spending more time doing what matters most, financial independence starts with thoughtful decisions today.

Wishing you and your loved ones a safe, joyful holiday!

Post this on Independence Day - 07/04

## 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.)

Financial freedom looks different for everyone.

As July begins, ask yourself: What would more financial freedom mean for me?

More flexibility? Less stress? The confidence to make work optional someday?

A financial plan can help turn that vision into clear next steps.

[CTA: Connect / Book a planning session]

Post this any time in July

We're halfway through the year.

July is a good time to pause and ask:

Am I still on track?

Has anything changed?

Are there opportunities I should address before year-end?

A mid-year review can help you make thoughtful adjustments.

[CTA: Connect / Book a planning session]

Post this any time in July

## 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 Make a Difference to Children Month

July 1  
Canada Day

July 1  
National Financial Freedom Day

July 4  
Independence Day

July 19  
National Ice Cream Day

July 26  
Disability Independence Day

July 26  
Parents' Day

# EVENT PLANNING

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



## COLLEGE SEND-OFF PLANNING SESSION

Host a practical send-off session for families preparing for college move-in season—complete with helpful guidance, real talk, and a checklist parents and students can actually use.

Cover topics like student budgeting, 529 plan withdrawals, credit cards, insurance, and key documents to have in place before move-in day. No pressure. No jargon.

Just useful tips to help students start the school year with confidence—and help parents feel more prepared.



## ICE CREAM SOCIAL

Invite clients to bring their children or grandkids for a relaxed summer ice cream social designed to bring families together.

Set up a simple sundae bar, a few kid-friendly activities, and an easy takeaway that introduces basic money lessons in a fun, approachable way.

It's less about a formal presentation and more about creating a memorable afternoon that helps advisors connect with the next generation.

# JULY

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

| MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY |
|--------|---------|-----------|----------|--------|
|        |         | 1         | 2        | 3      |
| 6      | 7       | 8         | 9        | 10     |
| 13     | 14      | 15        | 16       | 17     |
| 20     | 21      | 22        | 23       | 24     |
| 27     | 28      | 29        | 30       | 31     |