

NOVEMBER 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

Veterans & Military Family Month



2

National Home Care & Hospice Month



3

National Gratitude Month



COMPLETE STRATEGY

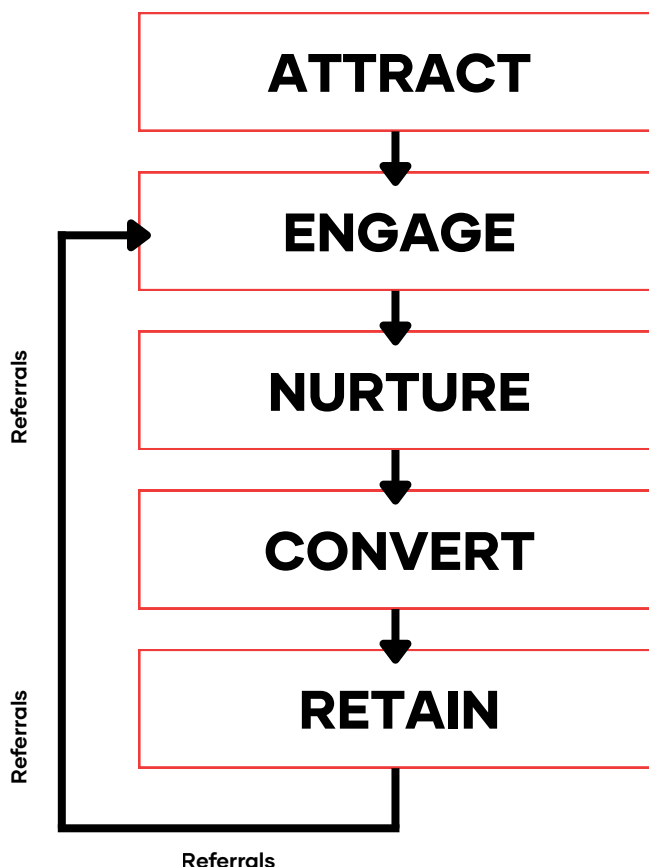
THE LEAD LIFECYCLE

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

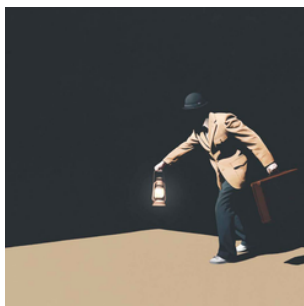
END OF YEAR HIDDEN TAX OPPORTUNITIES

Lead Generation Campaign



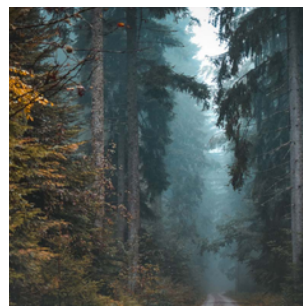
COMMON ESTATE PLANNING MYTHS

Visual Insights Newsletter



THE POWER OF SMALL DAILY ACTIONS

Visual Insights Newsletter



OR

THANKSGIVING & VETERANS DAY

Holiday Emails



TIMELY EMAILS

Launch ASAP



MEDICARE AEP RISK CHECK

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.

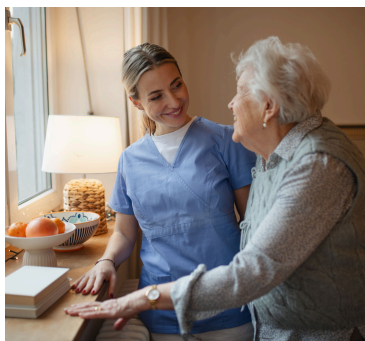
Coming Soon!

You won't want to miss these dropping soon.



THE ART OF SPECIFICITY

Ready Video



WHO PAYS FOR LONG-TERM CARE?

Prospect Engagement Campaign



GENERAL WINTER EMAIL

Holiday Email



CHARITABLE GIVING DESERVES A PLAN

Visual Insights Newsletter

1



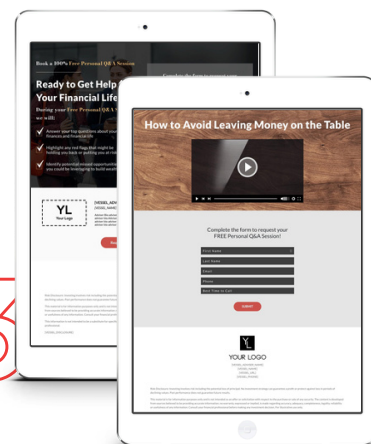
90-Day New Client Onboarding

2



Website Opt-in Form

3



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

GET SOCIAL

Post this on
World Kindness
Day [November
13]

A little kindness can go a long way. ❤️

This #WorldKindnessDay, find one small way to make someone's day better—send a thoughtful note, support a local business, help a neighbor, or simply tell someone you appreciate them.

Today, I'm **[PERSONAL ACT OF KINDNESS]**.
What will you do?

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.)

Today, we honor the veterans who have served our country. 🇺🇸

To the veterans in **[LOCATION]**, our clients, families, friends, and neighbors—thank you for your service and sacrifice.

[OPTIONAL: ADD A PERSONAL CONNECTION, LOCAL VETERANS ORGANIZATION, OR WAY YOU'RE RECOGNIZING THE DAY.]

Post this on
Veterans Day
[November 11]

There's a lot to be thankful for this time of year. 🦃

For me, that includes **[CLIENTS / TEAM / FAMILY / COMMUNITY / SOMETHING PERSONAL]**.

I'm especially grateful for **[PERSONAL DETAIL OR REFLECTION]**.

Wishing you and your family a happy Thanksgiving filled with good food, good company, and plenty to be grateful for.

Post this on
Thanksgiving
[November
26]

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.

November 1
Daylight Savings
Time Ends

November 3
Election Day

November 14
World Diabetes
Day

November 27
Native American
Heritage Day

November 27
Black Friday

November 28
Small Business
Saturday

EVENT PLANNING

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



FRIENDSGIVING BRUNCH OR DINNER

Bring clients together for a Friendsgiving celebration centered on good food and great company.

Partner with a local restaurant, caterer, or event space for a relaxed brunch or dinner where clients can connect, bring a guest, and enjoy the season.

A simple toast or note of appreciation adds a personal touch and gives you the opportunity to thank clients for being part of your community.



HOLIDAY CARD-MAKING FOR SENIORS OR VETERANS

Turn an afternoon of creativity into an opportunity to give back.

Invite clients and their families to make holiday cards for local seniors, veterans, hospital patients, or service members.

Provide festive supplies, snacks, and refreshments, and partner with a local organization to help distribute the finished cards. It's an easy, family-friendly event that brings clients together while spreading a little holiday cheer.

MONDAY TUESDAY WEDNESDAY THURSDAY FRIDAY

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