

SEPTEMBER 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

Life Insurance Awareness Month



2

World Alzheimer's Month



3

Medicare Annual Enrollment Prep



COMPLETE STRATEGY

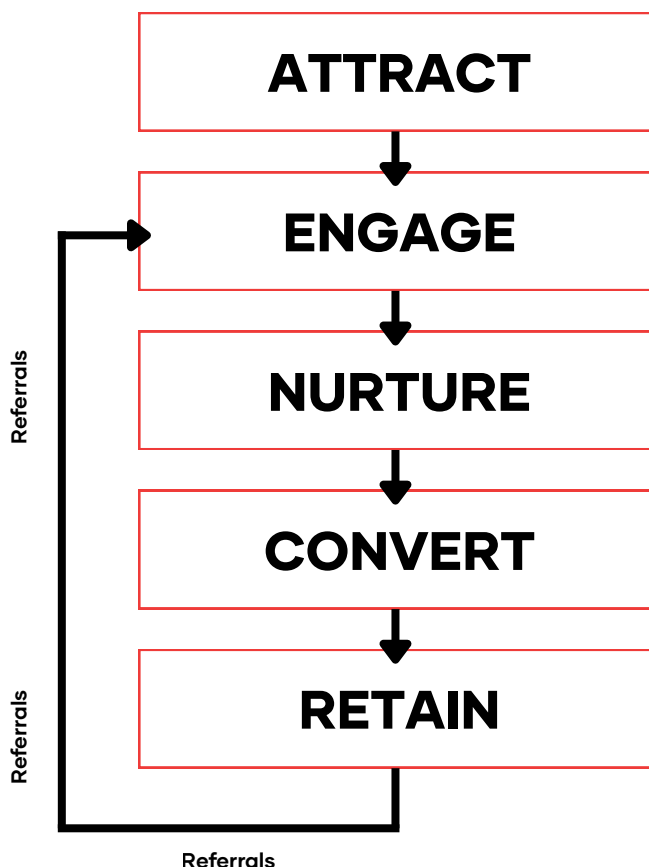
THE LEAD LIFECYCLE

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

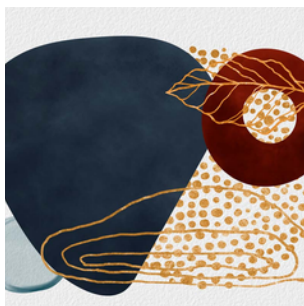
SUPPORTING ADULT CHILDREN WITH CONFIDENCE

Prospect Engagement Campaign



THE MONEY STACK

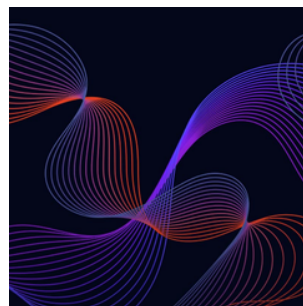
Visual Insights Newsletter



OR

LIFE'S FINANCIAL TURNING POINTS

Visual Insights Newsletter



THE ORDER YOUR MONEY SHOULD GO

Personal Connection Video



TIMELY EMAILS

Launch ASAP



LABOR DAY

Holiday 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.



COULD A LAYOFF SPARK OUR INNER ENTREPRENEUR?

Single Email



WHAT TO DO WITH YOUR OLD 401(K)

Lead Generation Campaign



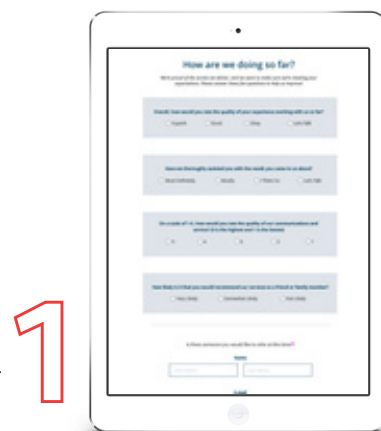
GENERAL FALL SEASON

Holiday Email



THE RETIREMENT RED ZONE

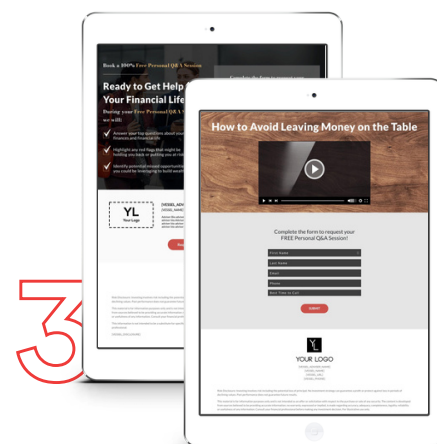
Visual Insights Newsletter



90-Day New Client Onboarding



Website Opt-in Form



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

GET SOCIAL

Post this on
September 7

Happy Labor Day from [ADVISOR FIRM NAME]!

Today, we celebrate hard work, meaningful progress, and the goals still ahead.

What accomplishment are you most proud of?

[CTA: Let's plan what's next]

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.)

This National 401(k) Day, give your account a quick checkup:

- Are you maximizing your employer match?
- Do your investments still align with your goals?
- Are your beneficiaries up to date?

[CTA: Let's review how your 401(k) fits into your financial plan]

Post this on
September 10

Autumn reminds us that meaningful change happens gradually 🍁

The same is often true of financial progress: consistent steps can move us closer to the future we envision.

What accomplishment are you proud of this year—and what goal are you ready to work toward next?

[CTA: Let's build a plan for your next step]

Post this on
September 22

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.

September 5
International Day of Charity

September 11
Patriot Day

September 13
National Grandparents' Day

September 15
Start of National Hispanic Heritage Month

September 16
National Working Parents Day

September 21
International Day of Peace

September 21
World Gratitude Day

EVENT PLANNING

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



FALL FINANCIAL CHECKUP

Give clients an opportunity to pause, reconnect, and review their financial priorities before year-end.

Invite them to stop by for refreshments and brief conversations about retirement contributions, charitable giving, beneficiaries, and upcoming life changes.

A simple year-end checklist can help clients identify priorities and determine whether a follow-up planning meeting is needed.



MEDICARE READY: YOUR ANNUAL ENROLLMENT PREP

Help clients prepare before Medicare Open Enrollment begins.

Invite a licensed Medicare specialist to explain what clients should review, which documents to gather, and what questions to ask when comparing coverage.

Medicare Open Enrollment runs October 15 through December 7, making September an ideal preparation window.

SEPTEMBER

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

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
	1	2	3	4
7	8	9	10	11
14	15	16	17	18
21	22	23	24	25
28	29	30		