

OCTOBER 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

Financial Planning Month



2

Cybersecurity Awareness Month



3

Long-Term Care Planning Month



COMPLETE STRATEGY

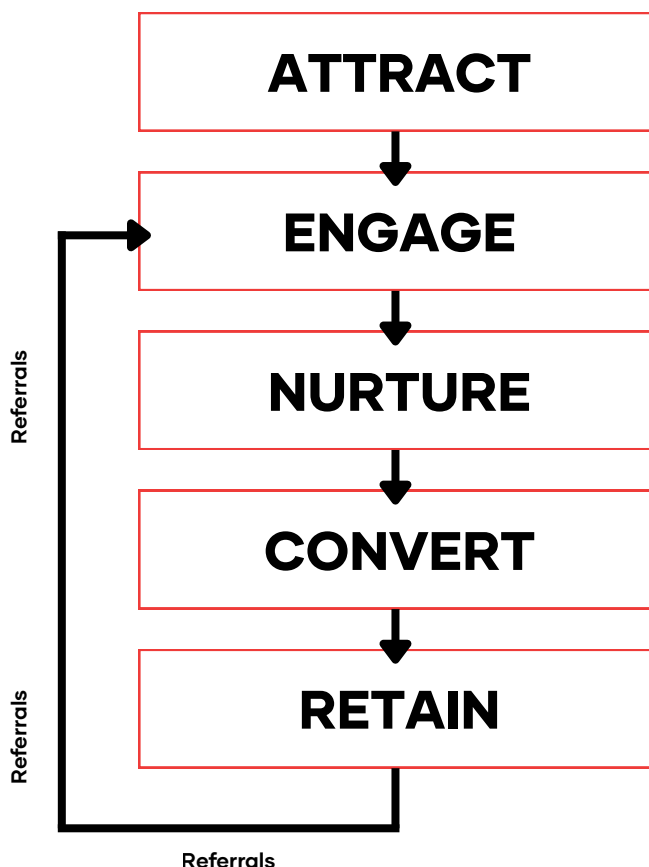
THE LEAD LIFECYCLE

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

WHAT TO DO WITH YOUR OLD 401(K)

Lead Generation Campaign



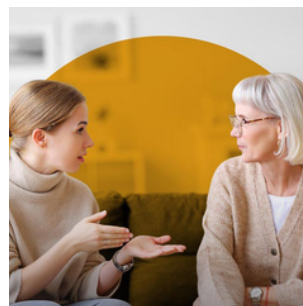
THE RETIREMENT RED ZONE

Visual Insights Newsletter



STARTING THE LONG-TERM CARE CONVERSATION

Visual Insights Newsletter



OR

PERMISSION TO SPEND

Personal Connection Video



TIMELY EMAILS

Launch ASAP



COULD A LAYOFF SPARK OUR INNER ENTREPRENEUR?

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.



Q3 2026 QUARTERLY FINANCIAL UPDATE

Quarterly Financial Update



END OF YEAR HIDDEN TAX OPPORTUNITIES

Lead Generation Campaign



THANKSGIVING & VETERANS DAY

Holiday Emails



COMMON ESTATE PLANNING MYTHS

Visual Insights Newsletter

1



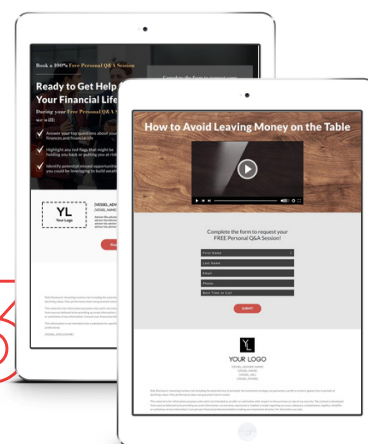
90-Day New Client Onboarding

2



Website Opt-in Form

3



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

GET SOCIAL

Post this on
October 5

Today, we're celebrating the teachers who educate, encourage, and inspire our communities.

A special thank-you to **[TEACHER'S NAME/LOCAL SCHOOL/EDUCATOR IN YOUR LIFE]** for **[PERSONAL DETAIL]**.

Who is a teacher who made a difference in your life? Share their name below!

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.)

Medicare Open Enrollment begins today and runs through December 7.

If you're eligible, now is the time to review your current coverage and consider whether it still fits your healthcare needs and financial plan.

Contact **[ADVISOR/FIRM NAME]** at **[CONTACT INFORMATION]** if you'd like help preparing for the conversation.

Post this on
October 15

Happy Halloween from **[FIRM NAME]**!

We hope your day is filled with more treats than tricks. **[ADD A PERSONAL MESSAGE, TEAM TRADITION, OR HALLOWEEN MEMORY.]**

What's your favorite Halloween tradition?

Tell us in the comments!

Post this on
October 31

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.

Breast Cancer Awareness Month

October 5
World Teachers' Day

October 8
International Dyslexia Day

October 10
World Mental Health Day

October 12
Columbus Day

October 12
Indigenous Peoples' Day

October 15
Medicare Open Enrollment Start Date

October 31
Halloween

EVENT PLANNING

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



PUMPKINS, PICTURES & FAMILY FUN

Host a festive client event at a local pumpkin patch where families can enjoy fall activities and professional photos.

It's an easy, memorable way to connect outside of formal meetings while celebrating the people and relationships behind every financial plan.

Bonus: Provide a seasonal treat or framed photo as a client gift.



DON'T GET TRICKED: HOW TO PROTECT YOURSELF FROM FINANCIAL SCAMS

October is Cybersecurity Awareness Month—use a Halloween theme to help clients spot financial “tricks.”

Partner with a cybersecurity expert to cover common scams, warning signs, and practical ways to protect their accounts and identity.

Bonus: Send attendees home with a fraud-prevention checklist and a Halloween treat.

OCTOBER

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

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
			1	2
5	6	7	8	9
12	13	14	15	16
19	20	21	22	23
26	27	28	29	30