



QRC – Equitable Advisors Marketing Suite Automated Marketing

GENERAL OVERVIEW:

Automated marketing campaigns are a key feature of the Marketing Suite platform, designed to help you effortlessly communicate and connect with your audience. These campaigns eliminate the need for individual content scheduling, helping you save time and energy. Additionally, the campaigns can be configured to send to specific contact groups, ensuring your messages reach the correct audience at the right times.

Important considerations:

While there are a number of automations available to you, it's important to consider your marketing strategy and who, and how, you're targeting those in your book with various forms of content available in the platform. **We highly recommend you don't turn on all automations, and instead look at your practice and your book, and focus on high value, relevant content for your specific audience.**

Campaign Name	Description	Frequency	Target Audience
Happy Birthday Email	Send a cheerful, unique greeting on each contact's date of birth, wishing them a happy day. View the birthday email designs here Click here to learn more about this campaign	These emails are sent at 6:00 AM PST on the recipient's special day.	All Clients
Happy Birthday Greeting Card	Leverage the power of snail mail to make your contacts feel special on their birthday! Note that specific card designs cannot be selected within this campaign; for personalized selections, consider sending a card manually . Note: This campaign has an additional charge. Learn more about this campaign here .	Cards are processed, printed, and sent 8 days before the contact's birthday to ensure postal delivery.	All Clients <i>*Highly recommended for your top clients</i>
Holiday Greetings	Let your clients and prospects know you're thinking of them all year long with professionally designed greetings sent on <i>New Year's Day, Mother's Day, Memorial Day, Father's Day, Independence Day, Labor Day, Veterans Day, Thanksgiving, and Christmas/Holiday Season</i> . Each greeting includes a link to a landing page on your website for recipients to view the full message, effectively driving traffic back to your website. Learn more about this campaign here .	Sent on, or shortly before, each major holiday	All Clients
Monthly Market Insights	Send your audience a market commentary video and written report featuring an overview of last month's market performance and a glance at the month ahead. Recipients are directed to a landing page on your website to access the video and full content. Learn more about this campaign here .	Monthly around the 1 st week of the month	All Clients



Automations continued...

Campaign Name	Description	Frequency	Target Audience
Social Foundation	Easily post content to social media and establish a consistent, foundational presence on LinkedIn and Facebook with automated, FINRA-reviewed posts. Each social post links to a landing page on your website, driving traffic and engagement. Learn more about this campaign here .	You configure the days of the week you would like content to be published as it's made available	All Clients
Video Of The Month	Keep in touch with an informative video on a financial topic that simplifies the complex, entertains and educates clients, and establishes you as a knowledgeable guide. Learn more about this campaign here .	1 st week of each month, as content is uploaded and approved.	All Clients
Weekly Market Insights Newsletter	Show your clients that you're on top of the markets with a well-rounded weekly commentary along with fun content such as a riddle of the week and tax tips. Learn more about this campaign here .	Every Monday	All Clients
Social Security Newsletter	Help contacts understand the role that Social Security plays in their long-term financial strategy with a newsletter entitled "Social Security & You". Learn more about this campaign here .	Quarterly - January, April, July, and October.	Pre-retiree and Next Chapters 55-75 years old
Breaking Financial News Messages	Connect with your clients to settle nerves after national news events such as a sharp market drop or bank failure. Learn more about this campaign here .	Generally 1-2x per year (during times of significant market-moving events)	All Clients
Chart Of The Month	Engage your clients with an insightful commentary on a thought-provoking chart. Learn more about this campaign here .	Sent at the end of each month	All Clients
Business Owner Messages	Send regular messages to business owners with an emphasis on exit strategies and business health. Learn more about this campaign here .	Quarterly around the second week of January, April, July, and October.	Business Owners
College Planning Newsletter	Help parents, grandparents, and students develop a college finance strategy with a newsletter entitled "College Corner". Learn more about this campaign here .	Quarterly during the first week of February, May, August, and November	Career Starters & Builders 25-52 years old
Cybersecurity & Scam Prevention Newsletter	Protect your contacts from life-altering scams by providing tips and strategies in a newsletter entitled "Quarterly Scam Safeguard". Learn more about this campaign here .	Quarterly on the second Tuesday of February, May, August, and November.	All Clients
Life Insurance Messages	Send regular messages helping contacts understand the value of life insurance. Learn more about this campaign here .	Quarterly on the first or second week of February, May, August, and November	Primary: All Clients Secondary: Builders & Next Chapters
Medicare Newsletter	Send clients enrollment reminders and important info with a newsletter entitled "Medicare Newsletter". Learn more about this campaign here .	Quarterly on the first Wednesday of February, May, August, and November	Pre-retirees & Next Chapters 65-80+ years old



Automations continued...

Campaign Name	Description	Frequency	Target Audience
Ages 20-39 Newsletter	Coach and nurture contacts in the first chapters of adulthood, career-building, and family with a newsletter entitled "Prosperity Pathways." Learn more about this campaign here .	Quarterly around the beginning of January, April, July, and October	Career Starters <40 years old
Ages 40-54 Newsletter	Coach contacts in the peak of their professional and wealth-building years with a newsletter entitled "Building Wealth." Learn more about this campaign here .	Quarterly around the middle of January, April, July, and October	Career Builders 40-54 years old
Ages 55-65 Newsletter	Inform pre-retirees of the financial and lifestyle changes on the horizon with a newsletter entitled "Retirement Insights." This automation replaces the formerly known "Retirement Insights" automation. Note the cadence has changed to quarterly. Learn more about this campaign here .	Quarterly around the middle of January, April, July, and October	Pre-retirees 55-65 years old
Ages 66+ Messages	Send messages to contacts and provide tips for a healthy and successful retirement life. Learn more about this campaign here .	Quarterly messages around the middle of January, April, July, and October	Next Chapters & Life Legacies 66+ years old
Social Security Newsletter	Help contacts understand the role that Social Security plays in their long-term financial strategy with a newsletter entitled "Social Security & You". Learn more about this campaign here .	Quarterly at the end of January, April, July, and October	Pre-retirees & Next Chapters 60-75 years old
LPL Weekly Market Commentary Email	Inform clients on the latest news impacting the market with insights from our partners at LPL. Best used for clients you have an advisory relationship with.	Weekly, as content is approved and uploaded	Clients you have an advisory relationship with.
LPL Client Letter	Monthly recap of market performance by LPL's Chief Economist and Market Strategists. Best used for clients you have an advisory relationship with.	1 st week of each month, as content is uploaded and approved.	Clients you have an advisory relationship with.
Referral Sequence	Do you hate asking for referrals? We'll take care of it for you. This campaign sends quarterly emails to your clients containing a link to a dedicated referral landing page on your FMG website where they can easily submit referral information. Learn more about this campaign here .	Quarterly - Jan, May, July, and Dec. (2024)	All Clients

Reference calendar view

Be sure to review your marketing calendar on a regular basis. This is your one-stop shop to see what content will go out over the next 14 days.

Marketing Calendar

Stay informed, stay ahead: keep up-to-date on the content being sent out to your customers.

ASAP

1

Email

5 Tips for International Travelers

My Content

In Review

Preview

4

2

3

February

Fri 16

Social Foundation

The Three Keys to a Great Password

Automated

Preview

Mon 19

Email

Turn Your RMDs into Charitable Donations

My Content

Preview