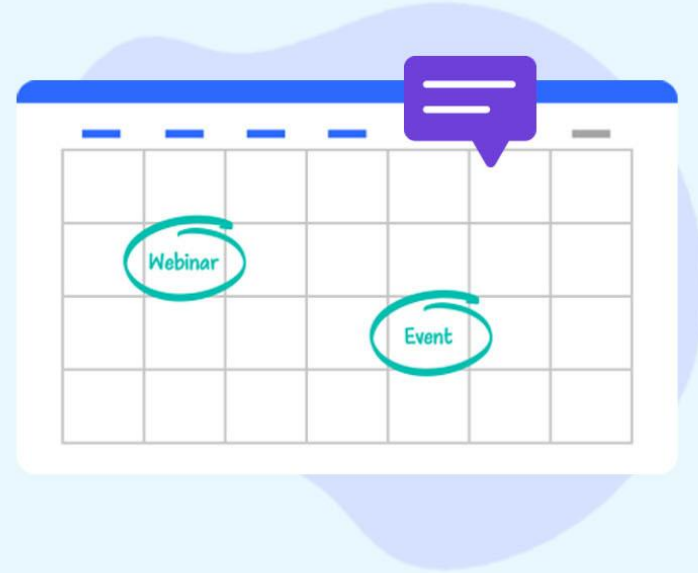




LIVE WORKSHOP:

# Events to Plan in 2025

How to Host Successful Events that  
Generate Quality Leads



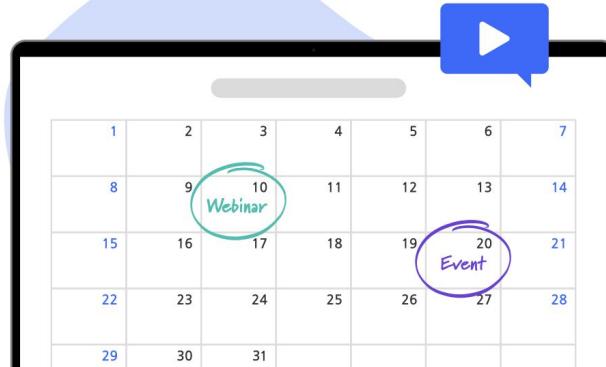
# 01



SECTION 4

## Events

Generate quality leads and referrals, and show client appreciation, **by hosting engaging events – online or in-person**



# Join us for all 5 Events in the 2025 Marketing Guide Series!



## 2025 Marketing Guide: Your Road to Success

### 2025 Marketing Guide Workshops

You've read the guide and are ready to elevate your marketing game. Now, it's time to take action! Join in on the workshop series to dive deeper into each of the five marketing pillars that will define success for financial advisors in 2025.



#### [Events that Generate Quality Leads](#)

*January 16, 2025 at 11:00am PT / 2 pm ET*

Learn how to plan and host successful events that attract high-quality leads in 2025



#### [Video Marketing: From Setup to Success](#)

*February 5, 2025 at 11:00am PT / 2 pm ET*

Discover how to create professional-looking videos without complicated equipment or huge budgets



#### [AI-Driven SEO Strategies](#)

*February 27, 2025 at 11:00am PT / 2 pm ET*

Explore how AI is revolutionizing SEO and adapt your strategies for Google's evolving algorithms



#### [Social Media Trends and Tactics](#)

*April 16, 2025 at 11:00am PT / 2 pm ET*

How the algorithm works, the #1 tip for growing and the specific actions to take each day to convert followers



#### [Communications Workshop](#)

*March 27, 2025 at 11:00am PT / 2 pm ET*

Email is where people go from lead to booked meeting. Learn the specific emails to send to make it happen



# Events Success Checklist Coming Your Way!



## Events Checklist

Follow these steps to ensure you're creating memorable, strategic experiences that **drive business growth and client engagement**

### Pre-Event Planning

- Define clear event objectives (lead gen, education, client appreciation, engagement)
- Choose your event type: virtual or in-person
- Identify target audience and relevant topic
- Choose the date/time, select a location, set your budget and define your goals

### Event Design

- Develop agenda and presentation materials
- Identify potential speakers/strategic partners:
  - Collaborate with complementary businesses
  - Virtual: Local estate planning attorneys, real estate agents, tax professionals
  - In-Person: Local wineries, yoga studios, wellness centers

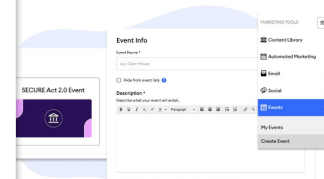
### Marketing and Promotion

- Design event branding
- Create a registration landing page
- Develop an email marketing campaign
  - Initial invite (2-3 weeks prior)
  - Reminder emails (1 week, 1 day, day of event)
- Post on social media + create a LinkedIn Event listing
- Reach out to potential partners/influencers
- Send personal invitations to high-value prospects



To build excitement, use language such as: "Several attendees have asked about bringing guests. RSVP now to secure your spot and guest invitation."

...ent easy! Enjoy the flexibility of pre-built  
...d content, and harness the power of



...re-changer for promoting our client events. We love  
...a landing page to capture RSVPs all within the FMG  
...response rates; it saved us time with compliance, and  
...website makes our promotions work even better!

Kevin Blondina  
B & D Group

### Consultation Offer:

...with a free 20-minute consultation tailored to your  
...goals and show you exactly how we can help you  
...as much or little effort on your part.

[Schedule Now](#)

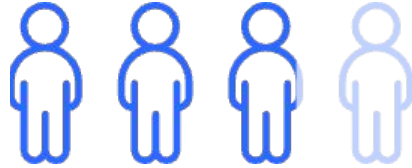
99% of advisors say "If I  
can just get in front of  
people, I'll close the deal"



**WEBINARS** are your secret to getting in front of MANY  
more of them

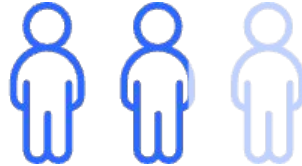
# How many advisors are currently focused on hosting:

23%



Webinars

16%



In-Person Events

# Steps to Hosting a Successful Event 🎉

## 1. Decide on Topic /Format

- Webinar or In Person?
- Include Guest Speaker?
- Do you need a venue?
- Choose a topic your ideal client will want to attend!

## 3. Promote!

- Create sub-groups for best performance
- Start dripping emails 1-4x month

## 5. Create Follow Up Assets

1. Download Recording (Webinar)
2. Add new contacts to CRM
3. Gather Links/Resources
4. Upload video (Webinar)
5. Write Email

## 2. Create Great Registration Page

Tell EXACTLY what someone will get for coming!

The more details he better

## 4. Host Event!

**In Person:** Collect contact info for EVERY attendee

**Webinar:** use tools to determine who is most engaged. Use polls to assess follow-up interest

## 6. Add Registrants to Drip Campaigns

Create sub-groups for best performance

Start dripping emails 1-4x month

# 02

# Webinars



# Virtual Webinars: Maximizing Engagement and Lead Generation

Utilize an educational, online seminar format to:

- Generate high-quality leads
- Provide scalable content with high ROI
- Build brand awareness and establish authority
- Offer accessibility and convenience



**23%**

of firms are currently using webinars\*

# Webinar Topic Ideas

## Timely Topics

- Pending legislation
- Quarterly Market Recaps

## Niche-Specific Topics

- Specific to doctors, business owners, etc

## Evergreen Topics

- Taxes
- Social security/Medicare

### Source:

<https://www.jclfg.com/events/social-security-basic-rules-and-claiming-strategies>

The screenshot shows a webinar registration page for JCL Financial Group. The page features the JCL logo and navigation links for Home, About Us, and Services. The main content area is titled "27 Oct Social Security: Basic Rules And Claiming Strategies". It includes a description of the webinar, a list of topics to be covered, and a list of topics to be avoided. The page also displays the date and time (Thu, Oct 27, 2022, 6:00p - 7:00p EST) and the location (Webinar). Below the registration page, there is a video player showing a recording of the webinar. The video player includes a title "Social Security: Basic Rules and Claiming Strategies", a speaker name "James Lynch", and a description "SAVVY SOCIAL SECURITY PLANNING Basic Rules and Claiming Strategies". The video player also displays the speaker's name, title, and contact information: "James C. Lynch, AIF, RICP, JCL Financial Group, 54 Friends Lane, Suite 112, Newtown, PA 18940". The video player includes a progress bar, a play button, and a VIMEO logo.

Home About Us Services

**27**  
Oct **Social Security: Basic Rules And Claiming Strategies**

DATE AND TIME  
Thu, Oct 27, 2022  
6:00p - 7:00p EST

LOCATION  
Webinar

DESCRIPTION

You have questions:

- How much can I expect to receive from Social Security?
- Why does it matter when I apply? And when should I do it?
- Do I have to actually retire to get benefits?
- Will Social Security even be there for me?

In just 30 minutes, we'll cover:

- How to decide when to collect your benefits.
- How to coordinate benefits with your spouse.
- The Social Security options available to divorcees.
- How the death of a spouse affects your Social Security benefits.
- How work affects your benefits.
- How your benefits are taxed—and what you can do about it.

You need to know:

- How to avoid making a poor (and almost irreversible) Social Security claiming decision.
- The huge impact of survivor benefits on smart claiming decisions.
- How recent legislative changes may have impacted your strategy.
- What to do if you were counting on a claiming strategy that's no longer available.

54 Friends Lane Suite 112

JCL  
FINANCIAL GROUP  
L.L.C.

Social Security: Basic Rules and Claiming Strategies

James Lynch

SAVVY SOCIAL SECURITY PLANNING

Basic Rules and Claiming Strategies

James C. Lynch, AIF, RICP  
JCL Financial Group  
54 Friends Lane, Suite 112, Newtown, PA 18940

57:30

vimeo



# Our Biggest Tip: Invite a SME and interview them!

**SERVING**  
THOSE WHO **SERVE**

About STWS | Blogs & Podcasts | Ed Zurndorfer

[← All Webinars and Seminars](#)

**Feb 12**  
**2025**  
11:00 am – 2:00 pm (EST)

**Tax Planning with Ed Zurndorfer**

Core Webinar | [Tax](#)

**REGISTER NOW**

Don't miss the opportunity to learn from one of the leading professionals on Federal Employee Benefits, Ed Zurndorfer, in a complimentary webinar for federal employees.

## This Session Covers

### Tax Planning for Feds:

#### An Overview of How Federal Benefits are Taxed

- FERS Annuity
- CSRS Annuity
- TSP Withdrawals from both Traditional and Roth TSP accounts
- Survivor Benefits

Ed reviews how the IRS treats each of these items for Federal Employees.

#### Other Tax Planning Topics to Consider

The taxation of Social Security Benefits, how much the state you live in impacts your net amount of income, and which states have the highest and lowest property tax rates

#### The 2017 Tax Law

- How it affects Federal Employees
- Things to watch out for
- 2020 tax brackets
- IRA Contribution Limits
- How Medicare affects taxes ... plus more!

# Host Subject Matter Experts and Interview Them!

**Retirement Planning:** Retirement coaches or counselors, CPAs (Certified Public Accountants), estate attorneys, and social security benefits consultants.

**Economics:** Economists, finance professors, or market analysts can provide a broader economic and market perspective.

**Tax Planning:** Tax attorneys, CPAs, or Enrolled Agents (EAs) who specialize in tax planning.

**Estate Planning:** Estate attorneys, trust officers at a local bank, or experts in elder law could add valuable insights.

**Risk Management and Insurance:** Insurance agents or brokers, risk management consultants, or financial risk analysts.

**Education Savings:** College admissions consultants or financial aid officers at a local university can help parents understand the costs of education and the financial aid landscape.

**Behavioral Finance:** Psychologists or therapists specializing in finance-related stress or decision-making, or professors of behavioral economics.

**Cybersecurity and Fraud Protection:** Cybersecurity consultants or IT professionals specialized in security, local law enforcement officers who deal with fraud and identity theft.

**Sustainable and Socially Responsible Investing:** Environmental scientists, sustainability consultants, or representatives from ESG-rating agencies or socially responsible funds.



# Informational Webinar Ideas for 2025

## High Net Worth:

1. Maximizing Wealth Transfer: Advanced Estate Planning Strategies for High Net Worth Families
2. Philanthropy and Legacy Planning: Making a Lasting Impact While Minimizing Taxes
3. The Future of Wealth: Preparing Your Portfolio for AI, Robotics, and Emerging Technologies
4. Cybersecurity and Wealth Protection: Safeguarding Your Family's Financial Information in the Digital Era
5. Balancing Act: Funding Elite Education While Maintaining Retirement and Legacy Goals

## Pre-Retirees

1. Beyond the Dollars: Preparing for the Emotional and Social Aspects of Retirement
2. What I wish I knew about retirement before it happened - hear from a retiree who has been there!
3. Retirement Housing Decisions: Evaluating Downsizing, Aging in Place, and Senior Living Options
4. Healthcare in Retirement: Planning for Long-Term Care and Unexpected Medical Expenses
5. Traveling in Retirement: Health insurance abroad, saving for the trip and maximizing your dollar

# Informational Webinar Ideas for 2025

## Small Business Owners

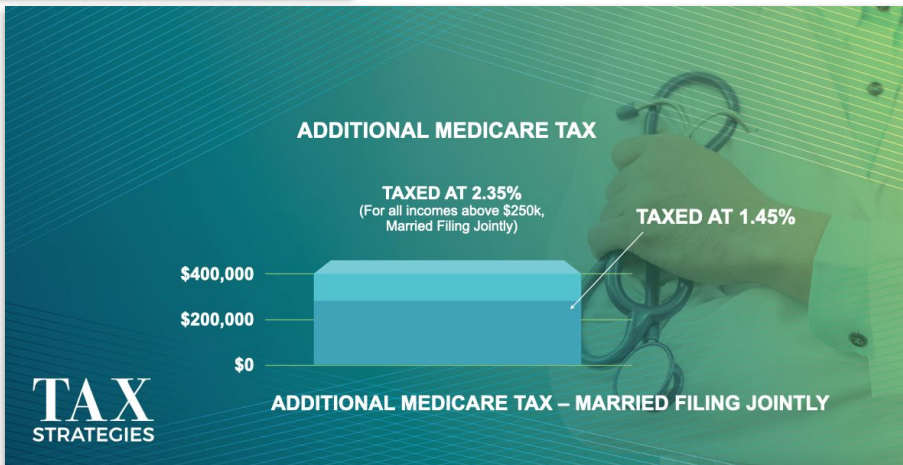
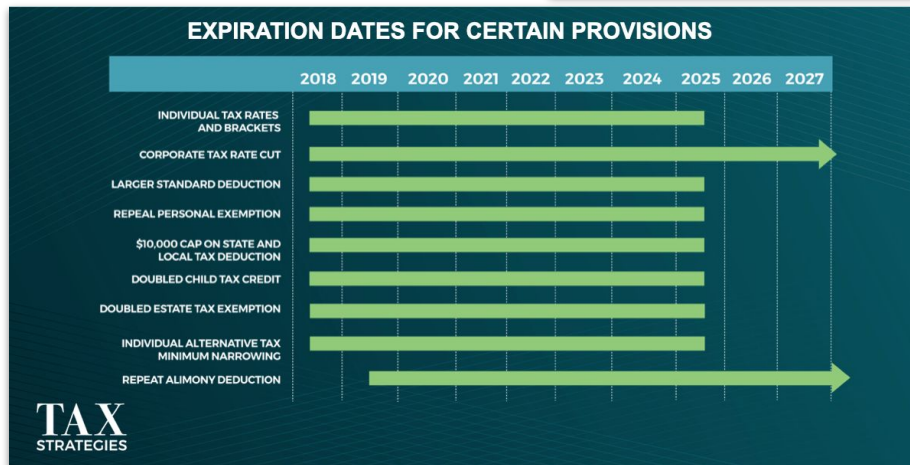
1. Employee Benefits on a Budget: Attracting Top Talent While Managing Costs
2. Tax Planning Secrets: Maximizing Deductions and Minimizing Liabilities for Small Businesses
3. Exit Strategies 101: Preparing Your Small Business for a Profitable Sale or Succession
4. Should you take on outside funding for your small business? How to determine when it's time
5. Key Financial Metrics Every Business Owner Should Track

## Tech Employees with RSUs

1. The RSU Tax Trap: How to Avoid Unexpected Liabilities in High-Growth Tech Markets
2. RSUs and Retirement: Integrating Equity Compensation into Your Long-Term Goals
3. Insider Trading Rules and RSUs: What Tech Employees Need to Know
4. The Intricacies of Executive Compensation: Optimizing Stock Options, RSUs, and Deferred Comp Plans
5. RSUs in a Volatile Market: Strategies for Mitigating Risk



# FMG Creates Webinar Slides & Assets For You!



# FMG Event Tool

fmg

FMG's Event Tool makes event management easy! Enjoy the flexibility of pre-built templates and customizable templates and content, and harness the power of automation and registration tracking.

[Learn More >](#)

MARKETING TOOLS



Cancel

Save Draft

Publish

Content Library

Website



Blog



Automated Marketing

Email



Social



Events



Events Intro

My Events

Create Event

## Create Event

Create an event based on one of the themes below, or choose a blank event to create an event that's unique to you.

### Select An Event Theme



SECURE Act 2.0 Event



Tax Strategies Presentat...



Client Appreciation Event



Check-In Webinar



Shred



### Event Info

Event Name \*

e.g. Open House



# 03

# Promotion

# Create a Registration Page People Want to Sign up!



[About](#) [Services](#) [The Voice of EIG®](#) [Blog](#) [Resources](#) [Events](#) [Contact](#)



## WEBINAR: SOCIAL SECURITY BENEFITS 01.30.2025

[Resources](#) [Events](#) [Contact](#)

[REGISTER](#)

### DATE AND TIME

Thu, Jan 30, 2025  
1:00p - 3:00p CST

### LOCATION

Webinar: Microsoft Teams

### NOTE

Webinar only, presented via Microsoft Teams.

Join us virtually for clarity on Social Security topics that can often seem overwhelming. Learn how your benefit is determined, tips on when to start receiving benefits, how Medicare is connected, plus details on spousal benefits and survivor benefits.

Even if you attended a previous presentation, join us again as regulations change year to year. This webinar is open to the public - share with your spouse, family or a neighbor who is planning for this stage of life.

**Live Webinar:** Register for this live virtual session. Due to government restrictions, we are not able to record the session. Slides will be available for registrants after the webinar.

#### Before you attend...

During the presentation you will learn how to use "my Social Security" online account and other online services. In advance of the webinar, go to [www.socialsecurity.gov/myaccount](http://www.socialsecurity.gov/myaccount) to create a my Social Security account and have your Social Security Statement (if applicable).



# Email Promotion Specifics

Send **THREE** emails for optimal performance.

- 1 week before
- 1 day before
- 1 hour before

Number of Email Reminders	Average Registrants	Percentage increase over 1 email reminder
1 email reminder only	256	-
2 email reminders	474	+85%
3 email reminders	807	+215%
4 email reminders	798	+212%

Source: <https://danielwaas.com/how-to-increase-webinar-attendance-rates/>

# How do you get more clients to refer friends and family?

## Marketing Tip:

- To get your clients to bring friends and family to your in person events --- Do this: One week after sending out the initial invitation, resend the invite, but this time, add a few sentences: “Wow, we’re thrilled by the excitement for the upcoming ‘xxxx’ event— we can’t wait to see so many of you. Several attendees have reached out asking if you can bring a guest or two. We are limited on space, but would love to host your friends or family. Please RSVP as soon as possible and we’ll try to accommodate as many as we can.”

# Promotion: What if I don't have a big email?

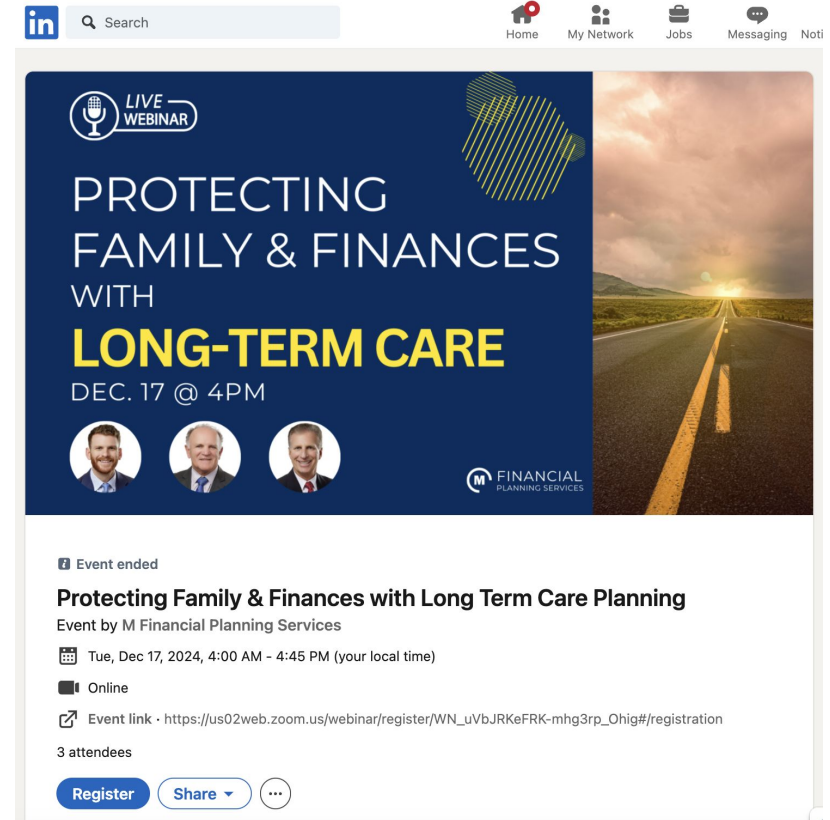
## Partner with COI or SME

- Have as a guest and Ask them to promote to their audience too
- Or just share with COIs whose audience could benefit

## Social Media

- Posts that focus on the BENEFIT someone gets from joining
- Direct invites via LinkedIn - target your audience
- Setup LinkedIn Event page →

## Encourage clients to share the email invite with others



# Social Media Promotion Specifics

- Don't start your post by promoting your event
- Start by talking about a problem your audience has
- Then offer some quick wins (that they get just by reading the post)
- THEN say "we are going to do X event to teach more about this"



**Samantha Russell** · You

Chief Evangelist at FMG Suite | Keynote Speaker | Marketing + Fi...

1w · Edited · 🌐



I used to host events and never get real leads from them.. until I started doing these 4 things.

- 1 Use the "WIIFM" approach to write the invitation/email/landing page
  - Clearly articulate what the person attending the event will get out of it
  - If it's a fun event - make it sound fun! include great photos!
  - If its educational, be crystal clear why they need to learn what you'll share

- 2 Have a way to collect names + email for EVERY SINGLE PERSON

- 💡 TIP: If your event is a LinkedIn Live, Youtube Livestream, a Podcast: ...You can collect leads easily with [Textiful](#) (my favorite tool)
  - Just say "Text this number and we'll send X to you"
  - (Just be sure what you're sending is amazing and people will want it!)

- 3 If you want people to ACTUALLY spread the word and invite their friends or family:
  - Follow the exact email template I lay out in the video (at the 1:20 mark)

- 4 Skip the hard sell, follow up with even more valuable education:
  - Don't host a great event, but then only do a hard sell afterwards 😞
  - Nobody wants to come to your event and then get 15 emails after of you asking them if they are ready "meet about their finances"

# Social Media Promotion Specifics

- Say “comment \_\_\_\_\_” and I’ll send you the link to join us!
- This builds momentum and gets people commenting on the post – which then alerts the algorithm to show it to even more people
- Direct Message and ask for comments/shares
- If you are partnering with a COI or SME – make sure you tag them! Tag the venue too if applicable!

Next week on Thursday, we at **FMG** are hosting a live event where I'll teach you:

1. The top event ideas for 2025
2. How to attract high quality leads to your event
3. The best way to follow up with leads after the event

● If you want to join us, comment "EVENTS" and I'll send you the link to sign up!

**BONUS:** Everyone who joins signs up will receive an event success checklist with our key takeaways compiled for easy reference all year long!

you've ever held? I'm looking for an advisor to join me and talk about it so please share!



# 04

# In Person Events



# In-Person Events: **Building Meaningful Connections**

Networking in person is a powerful way to:

- Create memorable experiences attendees will want to share
- Engage with clients and prospects on a personal level
- Demonstrate expertise through direct interaction
- Encourage networking and referrals
- Deepen client relationships across generations – don't forget to invite clients' children



**16%**

of advisors focus on hosting in-person events\*



# In Person Events That Bring the **WHOLE** family

## Cerulli Finds Just 19% of Investors Use Their Parents' Advisor

NOVEMBER 14, 2023 — BOSTON

An opportunity exists for advisors to focus on kindling intergenerational relationships

Just one in five affluent investors use the same advisor as their parents, according to the latest ***Cerulli Edge—U.S. Retail Investor Edition***. Advisors

FINANCIAL  
ADVISOR 

### Most Americans Inheriting \$100K+ Won't Stay with Their FA

Financial advisors who can address their clients' big picture, and not just their finances, stand to gain new clients, according to a new report from Equitable.

By Alex Padalka | October 10, 2024

The coming wealth transfer may leave some financial advisors wondering where all their clients went — while others may have a field of prospects ripe for the picking, according to a new report.

A recent McKinsey study estimates that more than \$30 trillion will change hands by 2030 — and most of the recipients will be looking for a new advisor, Equitable said it found in a survey of 500 retail investors anticipating receiving an inheritance or primary benefit of more than \$100,000.

# Family Picture Day Event

- Hire local photographer
- Choose Venue
- Send clients SignUp Genius Form
- You pay photographer, they pay for photos they want
- Collect names/emails of ALL family members at event
- Have (stain free!) snacks and water on hand!



# Family Wealth Conversations - Downloadable



## FAMILY FINANCIAL WORKSHOP

Company Name

### FAMILY MISSION STATEMENT ACTIVITY

A family mission statement is designed to build a shared identity and vision within a company. A family mission statement has a very similar purpose—to help you live intentionally and consciously embrace your values.

#### STEP 2: WRITE DOWN YOUR VALUES

Give every member of the family an opportunity to write down the values that he or she feels are important to the family.

- |                                    |                                     |                                    |
|------------------------------------|-------------------------------------|------------------------------------|
| <input type="checkbox"/> Love      | <input type="checkbox"/> Creativity | <input type="checkbox"/> Hard Work |
| <input type="checkbox"/> Fun       | <input type="checkbox"/> Discipline | <input type="checkbox"/> Humor     |
| <input type="checkbox"/> Adventure | <input type="checkbox"/> Honesty    | <input type="checkbox"/> Community |
| <input type="checkbox"/> Education | <input type="checkbox"/> Kindness   | <input type="checkbox"/> Integrity |
| <input type="checkbox"/> Faith     | <input type="checkbox"/> Compassion | <input type="checkbox"/> Service   |

#### STEP 3: DISCUSS YOUR VALUES AND CHOOSE FEWER THAN 10 TO CONSTRUCT YOUR MISSION STATEMENT

After everyone has written down the values that matter to them, discuss them as a family. The most important thing is to listen carefully to every member of the family no matter how young.

Even children want to know that their contribution matters.

#### STEP 5: REFINE YOUR MISSION STATEMENT

#### FAMILY MISSION STATEMENT DRAFT 2:

and adventure in a way that is our faith, strengthens our family.

honest with each other. experiences. We grow and working as

DRAFT 1:

#### STEP 6: REVIEW REGULARLY

Your mission statement should be a living document that inspires your day-to-day life.

Keep copies of it on your fridge, in your office, and in your children's rooms so that you can refer to it often.

### TELLING STORIES ABOUT WEALTH



Describe a financial mistake or important lesson you've learned in life.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Describe a time that you felt fortunate.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Describe a time that persistence and effort paid off.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Describe a time that you didn't have enough money.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



# Galantines Event

- Invite clients and let them bring a friend
- Widowed, married, divorced or single
- Host in a fun restaurant
- You provide wine and chocolate
- Invite everyone to dress up in red or pink



# Pickleball Tournament

- You sponsor and organize the event
- Open to community
- Have signage and swag w/Logo
- Invite Pro to give lessons/compete
- Offer “Healthcare in retirement: because you know you want to keep playing pickleball!” follow up webinar or 1:1 Conversations



# Events that brings similar clients together

[About](#)[Services](#)[The Voice of EIG®](#)[Blog](#)[Resources](#)[Events](#)[Contact](#)

## WISCONSIN WIDOWS CONNECTED 03.19.2025

**19**  
March

**Wisconsin Widows Connected: Giving Back**

[REGISTER](#)

### DESCRIPTION

Discover a variety of ways to give back through volunteering and philanthropic efforts. Jill Economou, Director of Community Relations at EIG, shares ideas for volunteering locally and the history of philanthropy at Ellenbecker Investment Group.

Social and conversation to follow. We'll also make fleece tie blankets for a local non-profit organization.

Wisconsin Widows Connected is a social and educational group dedicated to helping support female widows of all ages in creating a new normal. The ladies meet the third Wednesday of every month.

### DATE AND TIME

Wed, Mar 19, 2025  
5:30p - 7:00p CST

### LOCATION

Ellenbecker Investment Group  
N21 W23350 Ridgeview Parkway  
Waukesha , WI 53188

### NOTE

[BrokerCheck by FINRA](#)

# Events for Young Professionals

- Offer Professional Headshots
- Salary negotiation tactics
- How much to ask for in a raise
- How to price products or services as a new business owner

## Know Your Worth -- Financial Fitness Event

### Description

Join us for Know Your Worth a WISE Financial Fitness Event!

Wondering how much to ask for when requesting a raise?

Not sure what to say when an employer asks for your desired salary?

Having a hard time deciding on pricing for your products or services?

We've got you covered! Join us at the Cambria Hotel as Financial Advisor MJ Roach gives you all the best tricks of the trade and empowers you to Know Your Worth!





# 05

# Post-Event

# Step #1: Edit & Transcribe Video (if Webinar)

- Add subtitles
- Create Short Clips for Promotion (30 sec to 2 mins)
- Transcribe (you'll use this in your blog post)

The screenshot displays a video editing software interface. On the left, a sidebar contains various editing tools: Settings, Media, Audio, Subtitles (highlighted), Text, Elements, Record, Transitions, and Filters. The main workspace is divided into two panels. The left panel, titled 'Subtitles', shows a list of subtitle entries with their start and end times. The right panel shows a video player with a woman speaking, overlaid with large white text: 'Zero Click Content' and 'WHAT YOU NEED TO KNOW'. A subtitle bar at the bottom of the video player reads: 'How many times do you Google something and you get'. Below the video player, a timeline shows the video's duration from 0 to 60 seconds, with a playhead at 00:05:22. A keyboard shortcut bar is visible at the bottom of the timeline.

Subtitle Text	In	Out
How many times do you Google something and you get	00:04.4	00:07.7
the answer to your question without even needing to click	00:07.7	00:11.1
any website or blog to get the answer?	00:11.2	00:13.6
Google just gives you the answer	00:13.7	00:15.8
right there in the SERP.	00:15.9	00:17.2
The search engine results page page.	00:17.3	00:19.2
You might not realize, but more than two thirds	00:19.3	00:22.1
of all Google searches now end without a click.	00:22.2	00:26.4

# Step #2 - Add Recap of Event to Your Website

1. Link  
Resources

2. Upload video  
or photos

3. Add Link to  
Calendar

fmg

The screenshot shows the website header with contact information: 57 South Maple Avenue, Marlton, NJ 08053, 856-810-7701, and info@mfinancial.us. The navigation menu includes Home, About, Our Services, Our Resources, Client Center, and Contact. The main content area features a webinar announcement for 'Family Love Letter™ Webinar - Replay Now Available!' on November 13. The announcement includes the date and time (Mon, Nov 13, 2023, 11:30a - 12:30p EST) and the location (Webinar). A description follows, stating that the webinar features Karen Drancik from Neuberger Berman, who discusses the importance of estate planning and the value of the Family Love Letter™ document. A video player thumbnail is shown at the bottom, displaying the text 'Family Love Letter Media Replay' and 'MEDIA REPLAY' in large pink letters, along with a red ribbon tied around a stack of letters.

57 South Maple Avenue, Marlton, NJ 08053 856-810-7701 info@mfinancial.us Account View

**M** FINANCIAL PLANNING SERVICES, INC.

Home About Our Services Our Resources Client Center Contact

**13**  
Nov **Family Love Letter™ Webinar - Replay Now Available!**

**DATE AND TIME**  
Mon, Nov 13, 2023  
11:30a - 12:30p EST

**LOCATION**  
Webinar

**DESCRIPTION**

Our guest speaker—Karen Drancik from Neuberger Berman , provides excellent examples and anecdotes that demonstrate the importance of estate planning. The Family Love Letter™ is an great way to get started, and is an invaluable resource to your loved ones.

Family Love Letter™ is a non-legally binding, comprehensive document created to offer essential guidance to loved ones during crises or after their passing. It covers personal, financial, legal, and healthcare info, and sharing it eases the burden on family in tough times.

**M** Family Love Letter Media Replay  
FINANCIAL PLANNING SERVICES

Family Love Letter  
**MEDIA REPLAY**

Watch later Share

# Step #2 – Email all those who registered

- Divide into WHO attended and who DID NOT attended
- Different messaging for each
- Include Call-To-Action to schedule a meeting
- Have COI partners email too

On Mon, May 1, 2023 at 1:33 PM Samantha Russell <srussell@fmgsuite.com> wrote:

Hi Tracy,

Thanks for joining us on our social media webinar last week! It was a ton of fun, and I hope you stepped away feeling re-energized and motivated to connect and engage on social media.

As promised, [here is a link to the replay and slides](#).

Social media can feel a bit like a maze, which is why Stacy's quote really stood out to me: *"It's a dialogue, not a monologue, and some people don't understand that. Social media is more like a telephone than a television."* Wise words indeed! 🗨️

Our team is always here to help, whether you want to learn more about our "Do It For Me" program or simply want to chat about your social media strategy. [Just click here to book some time with us](#).

Remember, social media is all about engagement, so don't hesitate to reach out if you have any questions. I look forward to staying connected on social media! 😊

Have a great week!

Samantha Russell  
Chief Evangelist, FMG



*P.S. My next webinar is on May 10 with my friends at Holistiplan. We'll be covering the question – "My clients received their tax return. Now what?" and sharing specific strategies on how to engage with clients after tax day. [Click here to save your spot](#).*

# Step #4 - Identify the Best Leads

## Identify Hot Leads

### Find Leads By Reviewing:

- Attendees' time in the webinar
- Engagement levels
- Responses to survey questions
- Previously attended webinars
- Past marketing touches

You can also try sending a survey AFTER the event



# Step #5 - Repurpose Content to keep promoting

- Include the replay link in email newsletter
- Post great clips to social -say “Want the full workshop? Comment “Workshop” to get it! (then DM it)
- Turn it into a podcast episode

**HOW TO MOVE AWAY FROM THE HARD SELL SO YOU CAN ATTRACT YOUR IDEAL CLIENTS**

time on their calendar.

**BE YOUR OWN LOUD**

**PROUD MOUTH**  
INFLUENCE ACCELERATION

EPISODE #415 | Samantha Russell & Susan Theder | FMG Suite

# Ready to Start Generating Leads with Webinars?

- Collect registrants, email invites and automate follow up emails
- Pre-Made Webinar Slides, Scripts & Landing pages
- Direct Integrations with for easy compliance
- New Do It For Me Program

Contact Us: [Marketing@fmgsuite.com](mailto:Marketing@fmgsuite.com)



The screenshot shows a professional webinar landing page. At the top left is the JCL Financial Group logo. A navigation menu includes Home, About Us, How We Help, Events, Resources, and Tools. The main heading is '07 June Managing Health Care Expenses In Retirement'. The event details are: DATE AND TIME: Wed, Jun 07, 2023, 6:00p - 7:00p EST; LOCATION: Zoom Webinar. The DESCRIPTION section contains a paragraph about Medicare understanding, a sub-section 'This educational workshop will cover the following:' with a bulleted list of topics, and a small video player thumbnail at the bottom showing an older couple and the text 'Managing Health Care Expenses in Retirement' and 'SAVVY MEDICARE PLANNING'.