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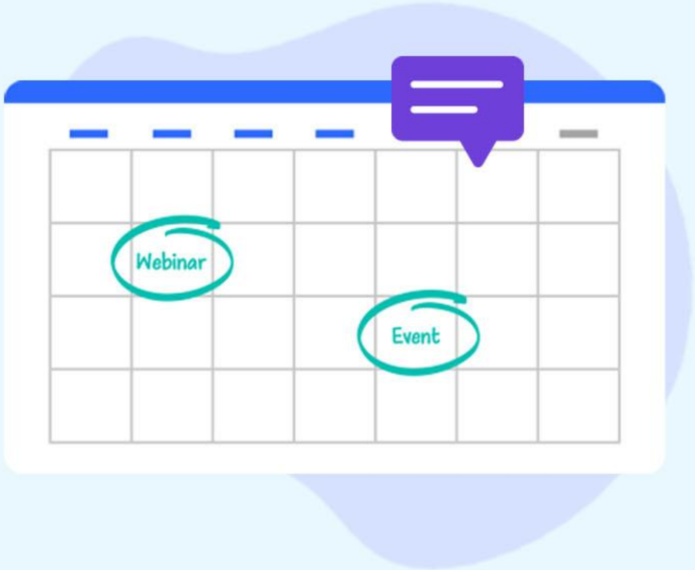
LIVE WORKSHOP:

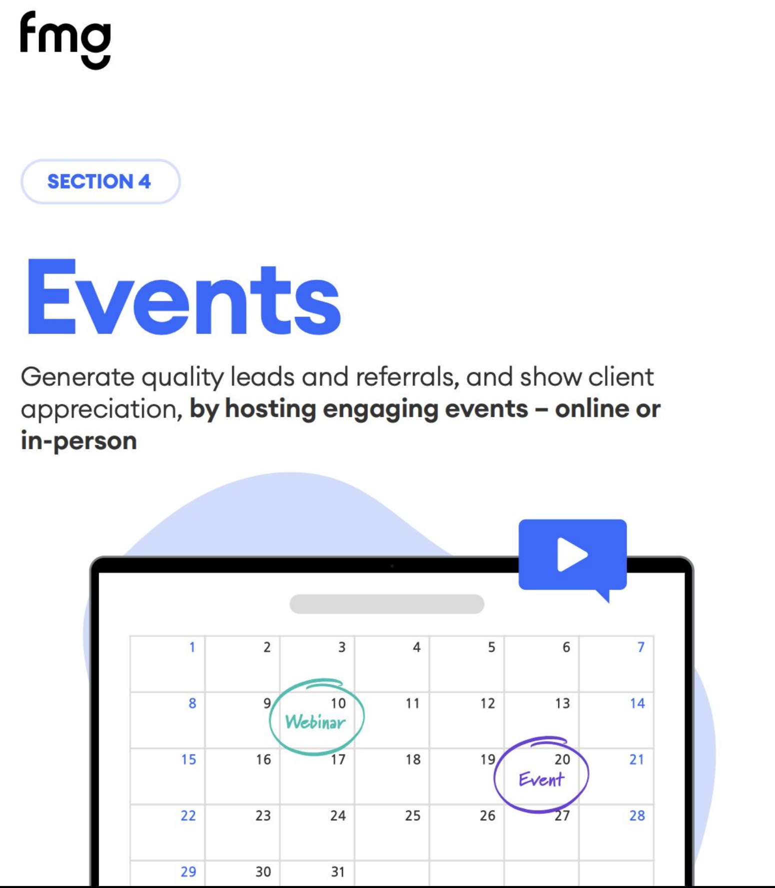
Events to Plan in 2025

How to Host Successful Events that Generate Quality Leads



2025 Marketing Guide

01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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!

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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

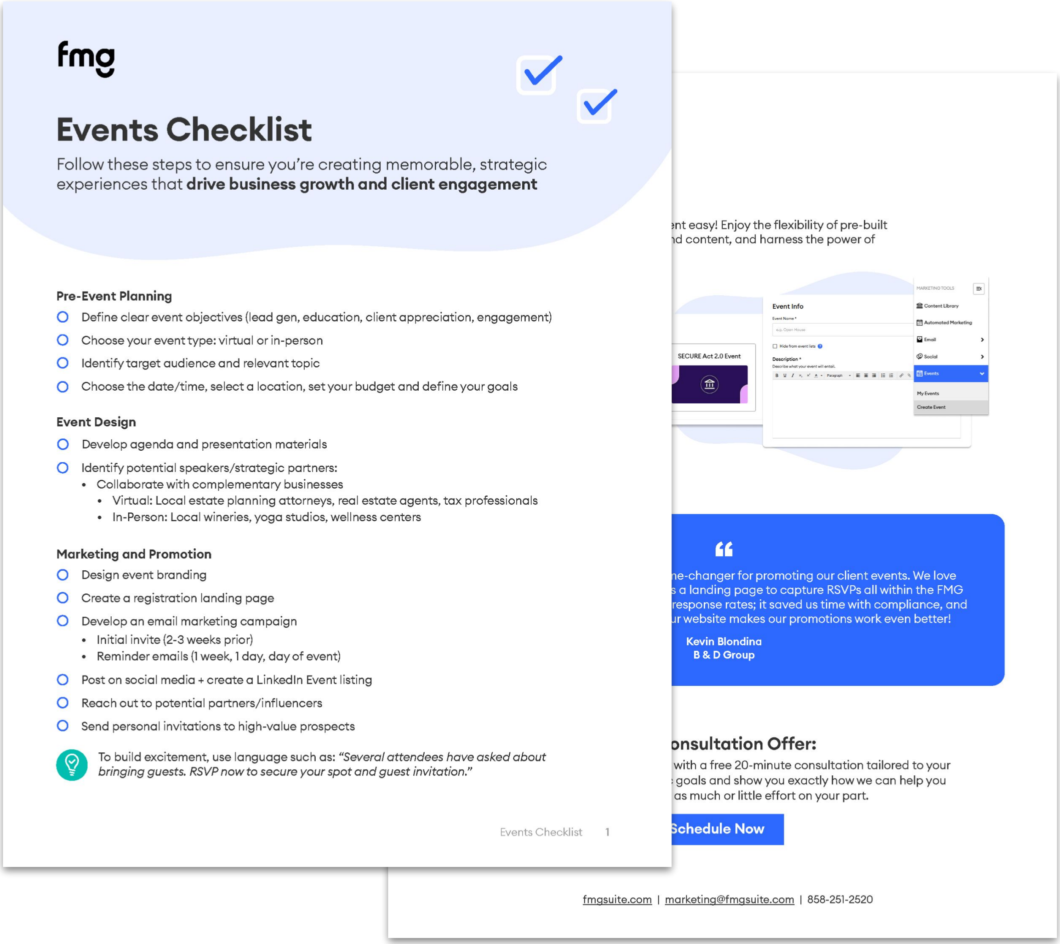
AI-Driven SEO Strategies
February 27, 2025 at 11:00am PT / 2 pm ET
Explore how AI is revolutionizing SEO and adapt your strategies for Google's evolving algorithms

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

Download Guide

Events Success Checklist Coming Your Way!



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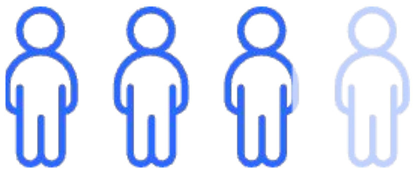
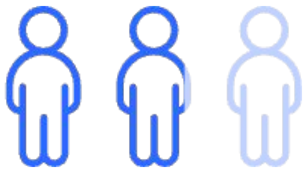
99% of advisors say “If I can just get in front of people, I’ll close the deal”

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

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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!

2. Create Great Registration Page

Tell EXACTLY what someone will get for coming!

The more details he better

3. Promote!

Create sub-groups for best performance

Start dripping emails 1-4x month

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

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

6. Add Registrants to Drip Campaigns

Create sub-groups for best performance

Start dripping emails 1-4x month

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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

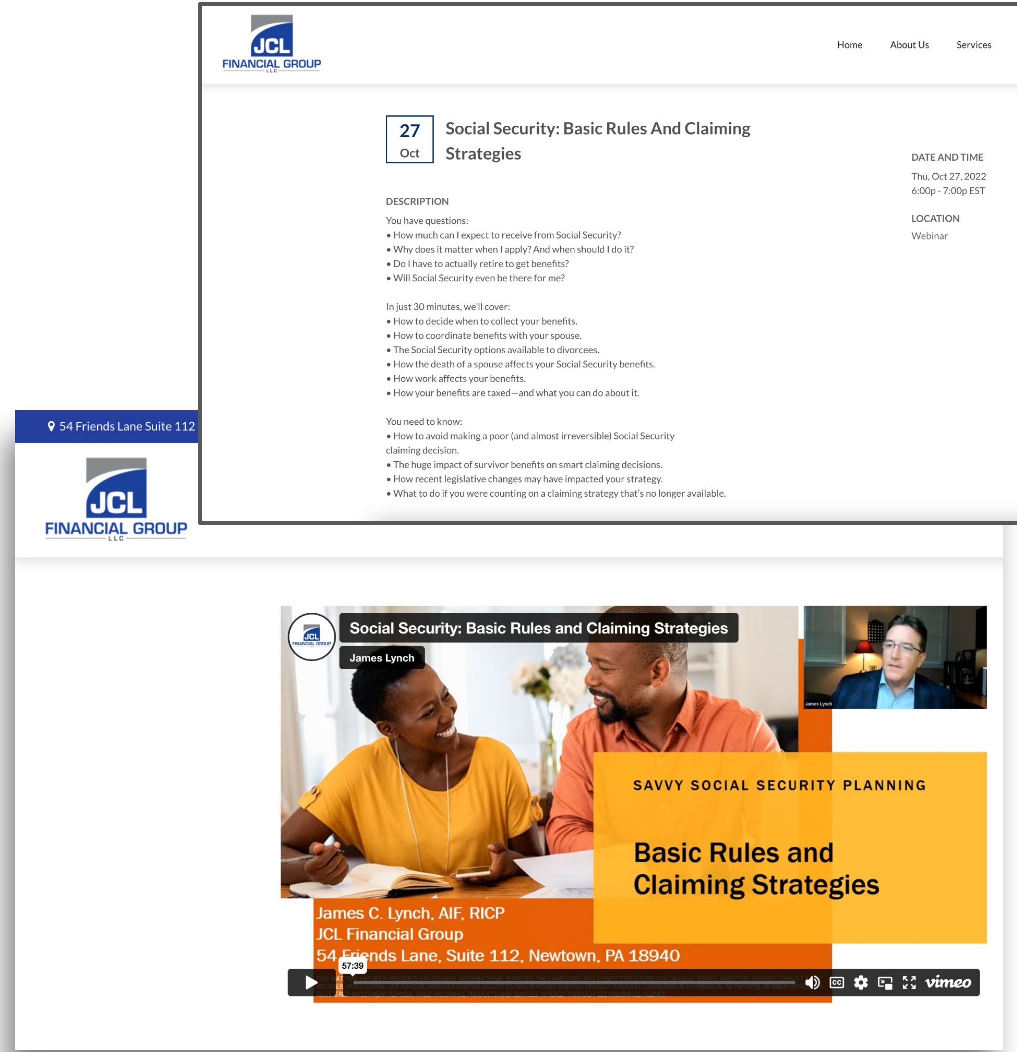
Niche-Specific Topics

- Specific to doctors, business owners, etc

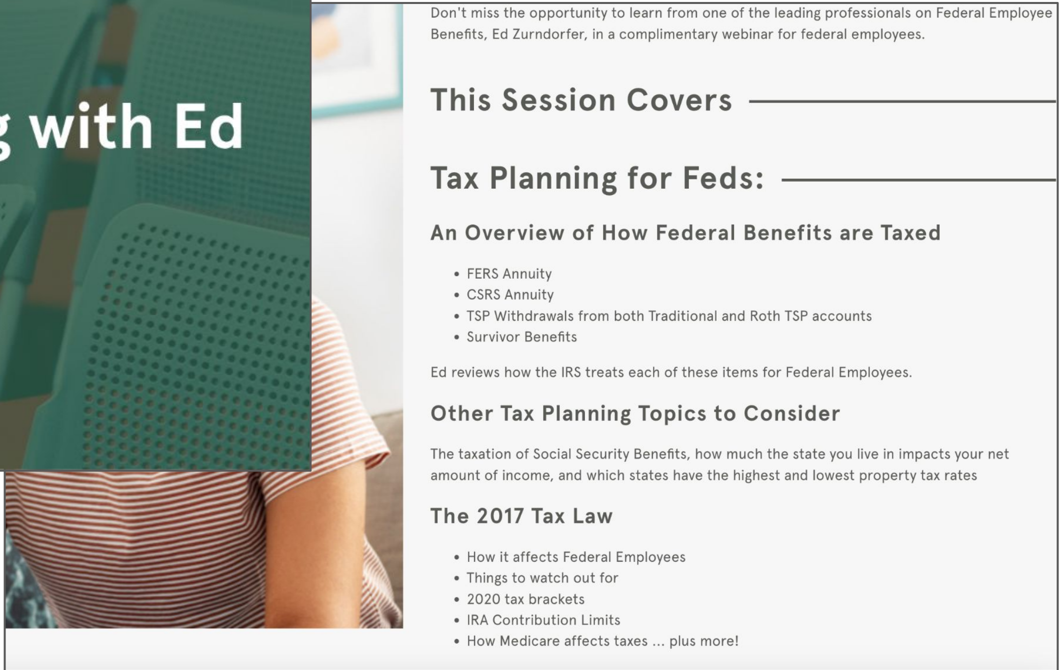
Evergreen Topics

- Taxes
- Social security/Medicare

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



Our Biggest Tip: Invite a SME and interview them!



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

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Informational Webinar Ideas for 2025

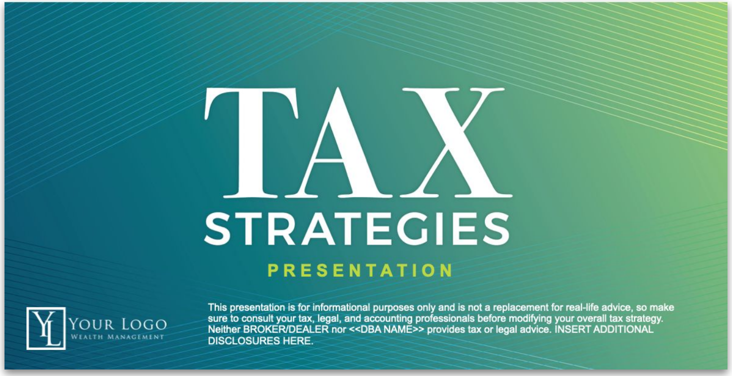
Small Business Owners

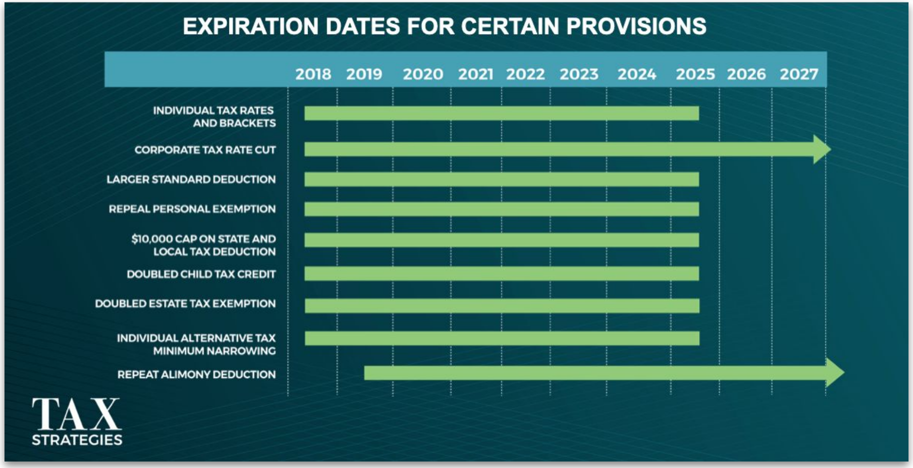
1. Employee Benefits on a Budget: Attracting Top Talent While Managing Costs
2. Tax Planning Secrets: Maximizing Deductions and Minimizing Liabilities for Small Businesses
3. Exit Strategies 101: Preparing Your Small Business for a Profitable Sale or Succession
4. Should you take on outside funding for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

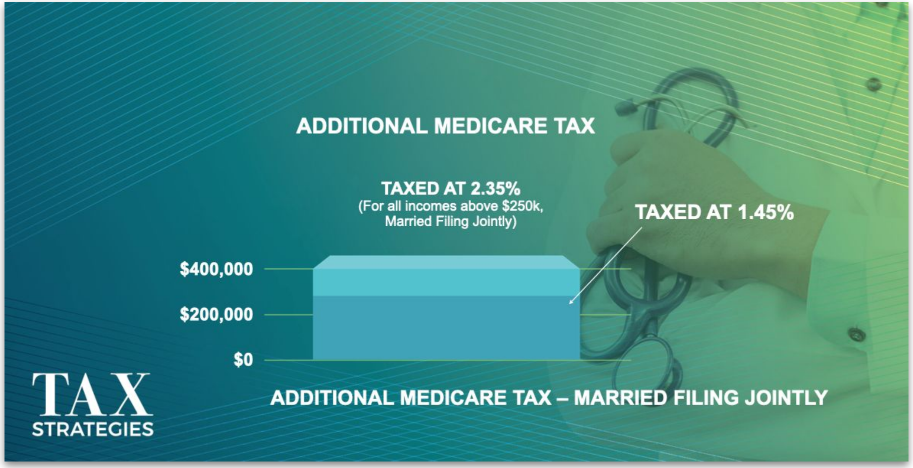
Tech Employees with RSUs

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!



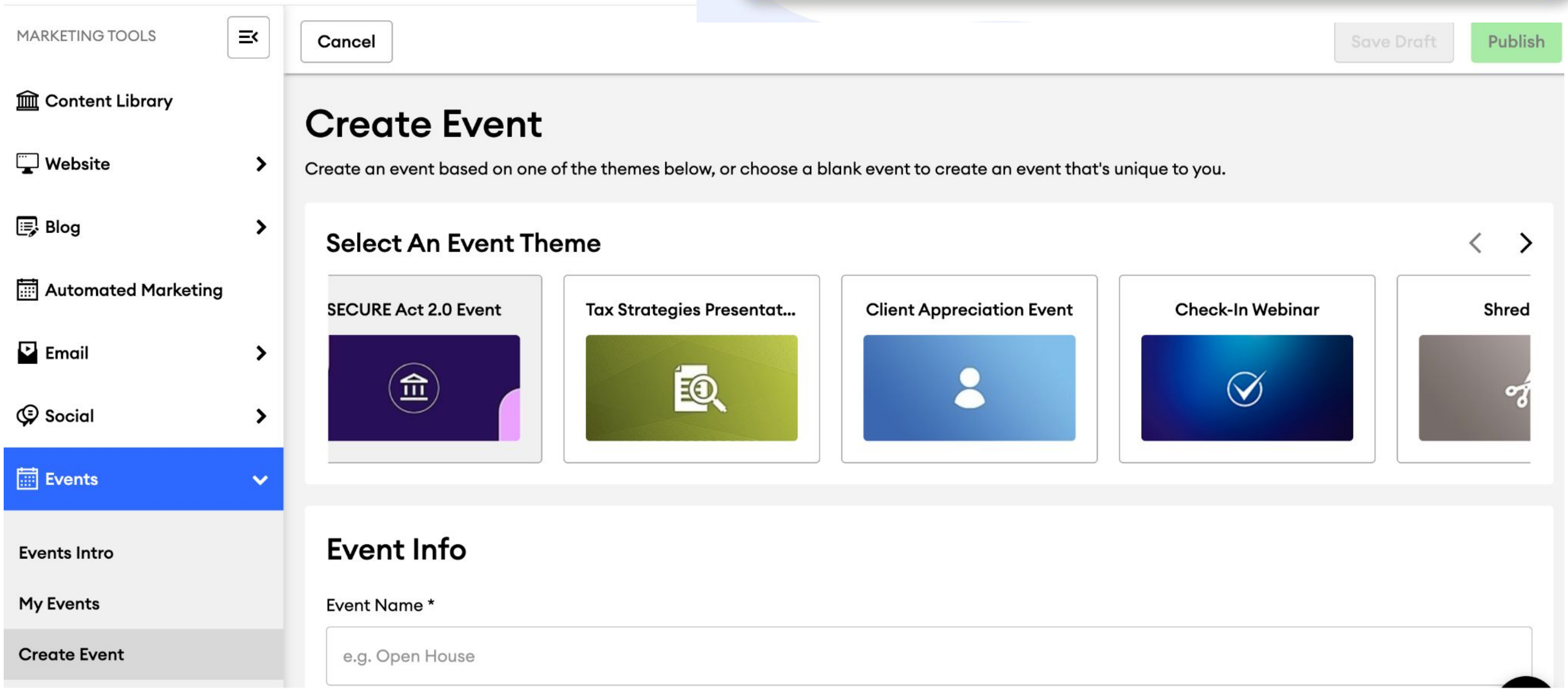




FMG Event Tool

FMG'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 >



03

Promotion

Create a Registration Page People Want to Sign up!

Ellenbecker Investment Group

About | Services | The Voice of EIG® | Blog | Resources | Events | Contact

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 to create a my Social Security account and have your Social Security Statement (if applicable).

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.

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/

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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.”

Source:FMG “Do It For Me” Marketing Program

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

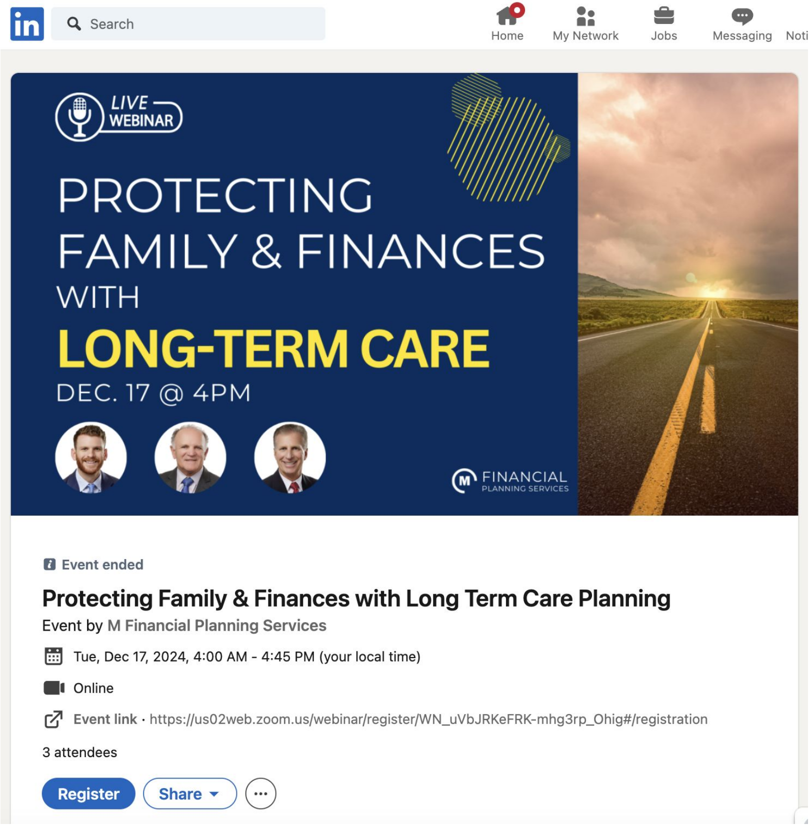
Partner with COI or SME

- 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.

1️⃣ 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

2️⃣ 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!)

3️⃣ 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)

4️⃣ 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'lll 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 IQ

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

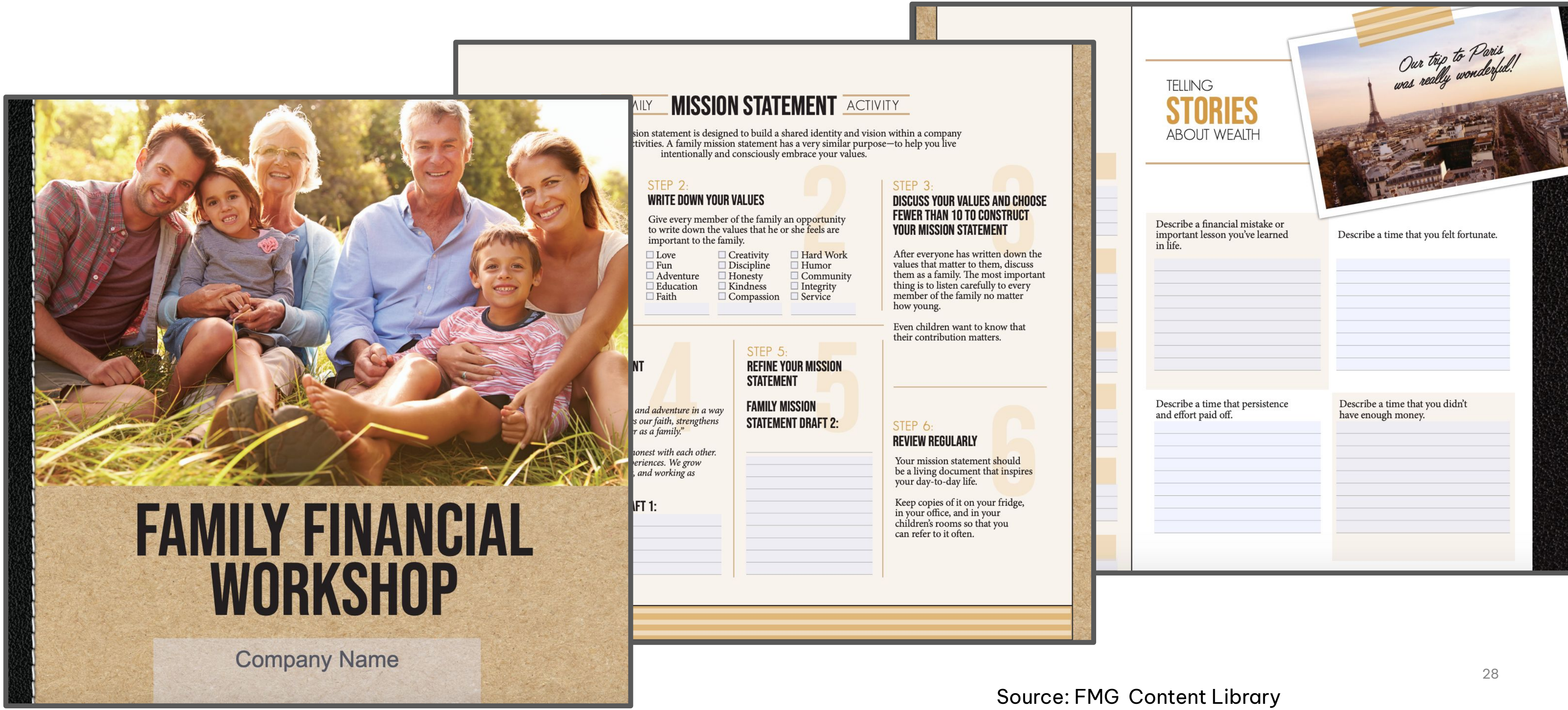
The coming wealth transfer may leave some financial advisors wondering where all their clients went — while others may have a field of prospects ripe for the picking, according to a new report.

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



Source: FMG Content Library

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

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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

Ellenbecker Investment Group

About Services The Voice of EIG® Blog Resources Events Contact

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!

WISE FINANCIAL FITNESS PITTSBURGH KNOW YOUR WORTH

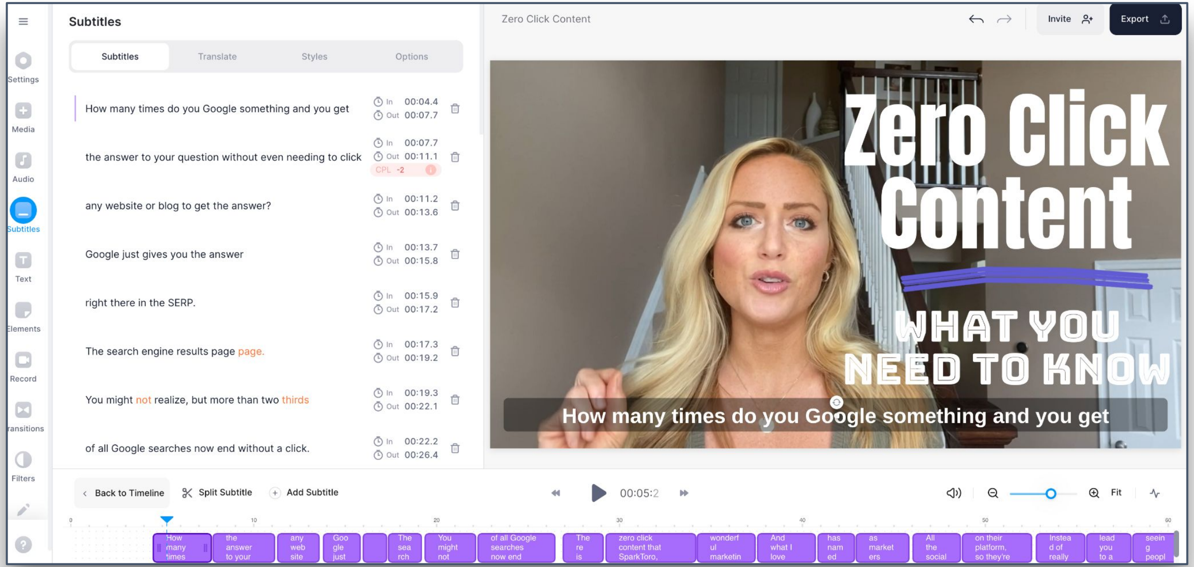
A WISE FINANCIAL FITNESS EVENT

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)



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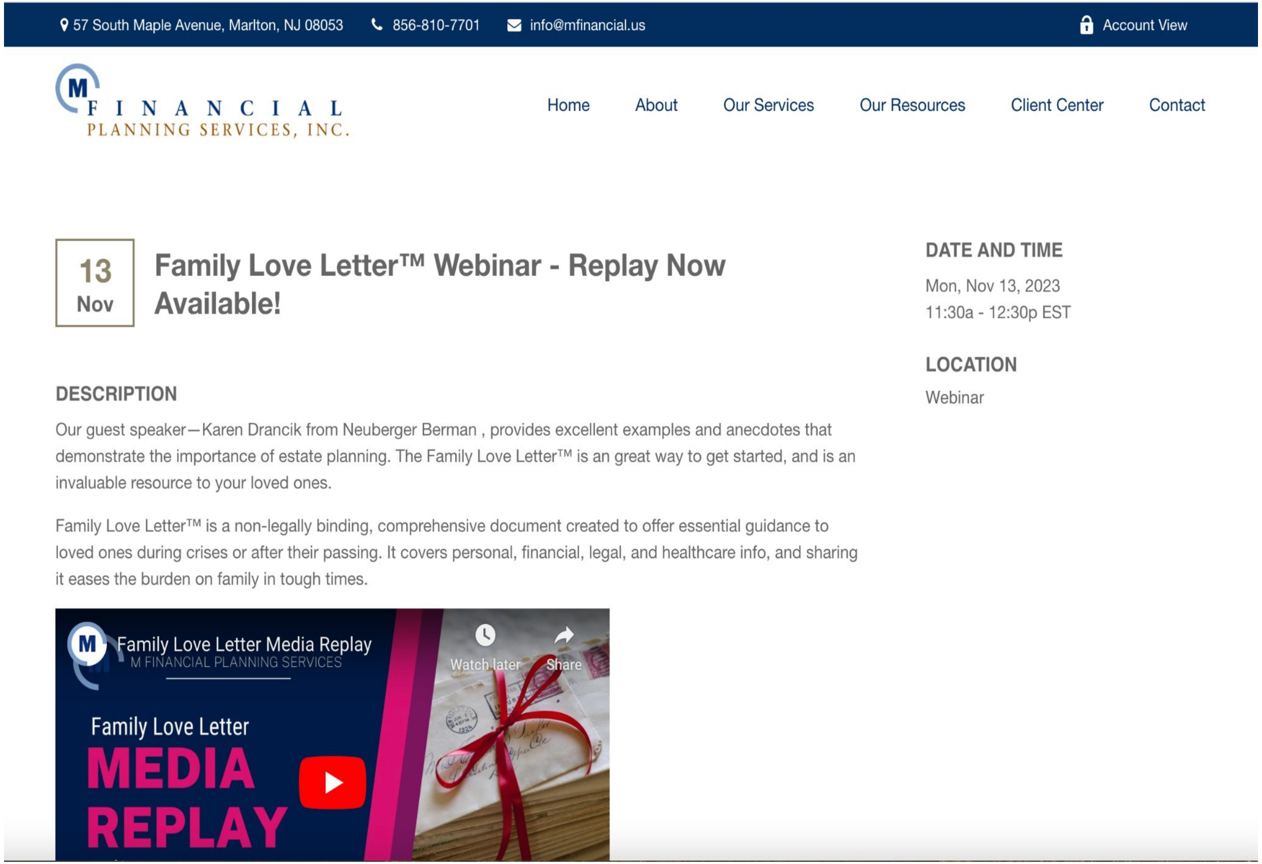
Step #2 - Add Recap of Event to Your Website

1. Link Resources

2. Upload video or photos

3. Add Link to Calendar



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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.

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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

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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

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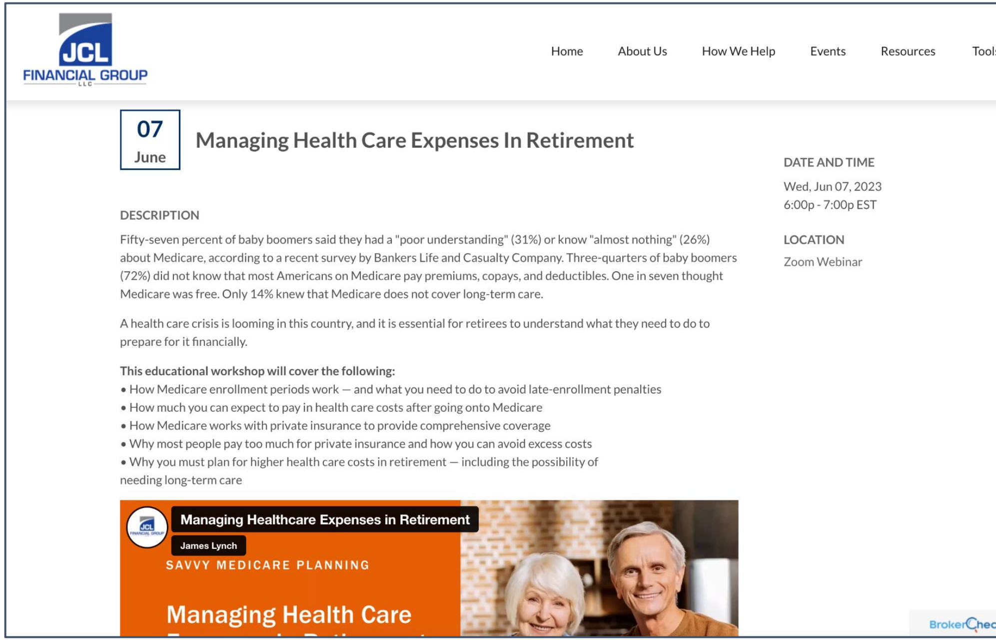
Ready to Start Generating Leads with Webinars?

- 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

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