



LIVE EVENT:

Unveiling the **FMG** **2025 Marketing Guide**

Everything you need to market and grow
your business



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Chief Evangelist



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We Want to hear from you today! Participate for a chance to win!



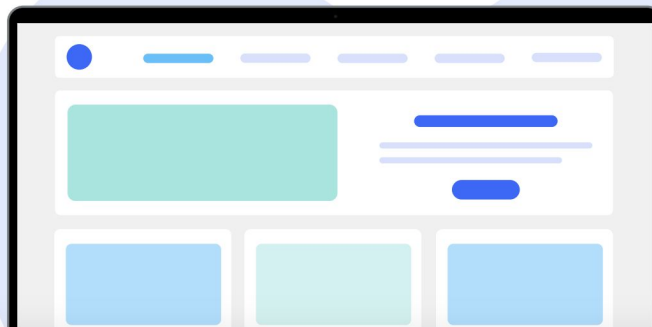
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SECTION 1

Website

Add personality to your website to **stand out from the crowd**

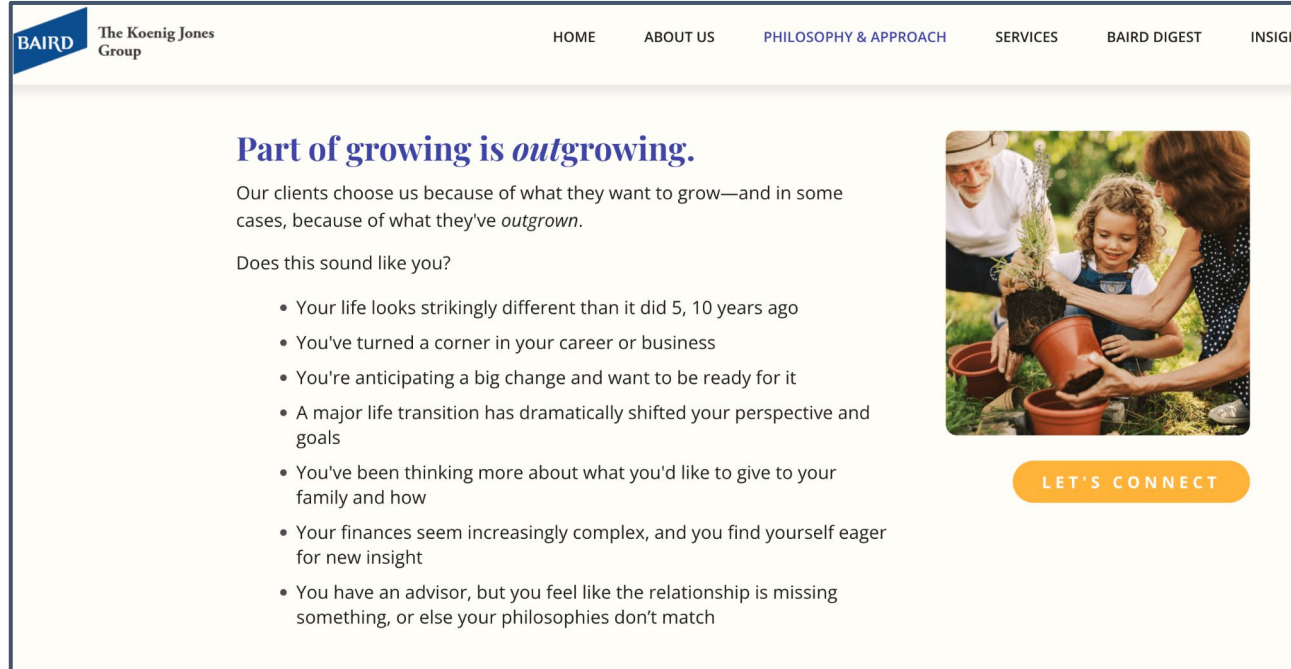


“I” vs. “We” Exercise

Make Your Message Resonate: Write How People Talk!

→ What is the **PROBLEM** your clients/customers & prospects have?

→ What is the **SOLUTION** you provide to that problem?



BAIRD The Koenig Jones Group


HOME ABOUT US PHILOSOPHY & APPROACH SERVICES BAIRD DIGEST INSIGHTS

Part of growing is *outgrowing*.

Our clients choose us because of what they want to grow—and in some cases, because of what they've *outgrown*.

Does this sound like you?

- Your life looks strikingly different than it did 5, 10 years ago
- You've turned a corner in your career or business
- You're anticipating a big change and want to be ready for it
- A major life transition has dramatically shifted your perspective and goals
- You've been thinking more about what you'd like to give to your family and how
- Your finances seem increasingly complex, and you find yourself eager for new insight
- You have an advisor, but you feel like the relationship is missing something, or else your philosophies don't match



LET'S CONNECT

Which message will allow someone to know if you help people just like them?



We Help Businesses, Families And Individuals Plan, Set
And Achieve Financial Goals

An advertisement for 'Retirement Curated' featuring a background image of a modern brick building with a canal in front. The text is overlaid on the image.

**Retirement
Curated™**

Retirement planning for individuals aged 50+ and 401k
solutions for businesses with 50-200 employees.

GET YOUR FREE ASSESSMENT



Supporting You When You May Need It Most

For recent widows or widowers, we help you navigate your new financial picture. For special needs families, we build a plan for both your own retirement and family legacy goals. For estates & inheritances, we help beneficiaries and executors navigate the maze of RMDs and taxation.

CONTACT US

RETIREMENT SIMPLIFIED

Fee Only Financial Advice, with a speciality in serving AbbVie
Executives nearing retirement



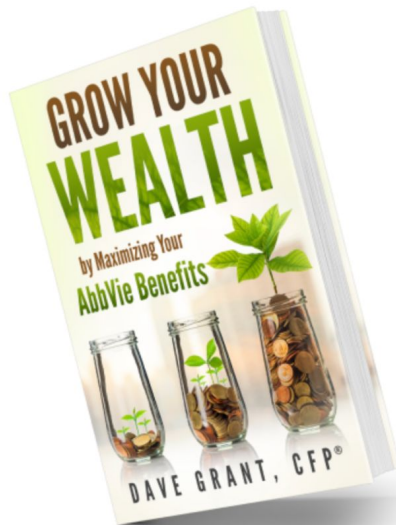
Retirement Matters is not affiliated with or sponsored by AbbVie, Inc. and is an independent company.

Source: <https://www.retirementmatters.co/>

RETIREMENT SIMPLIFIED

Fee Only Financial Advice, with a special
Executives nearing retirement

This is a great example of a
Secondary CTA! 🙏 🙏



WANT SOME FREE ADVICE?

We want to make sure you have access to all the knowledge we give to clients, should you want to implement your financial plan by yourself. Download this book to learn how to maximize your AbbVie benefits package.

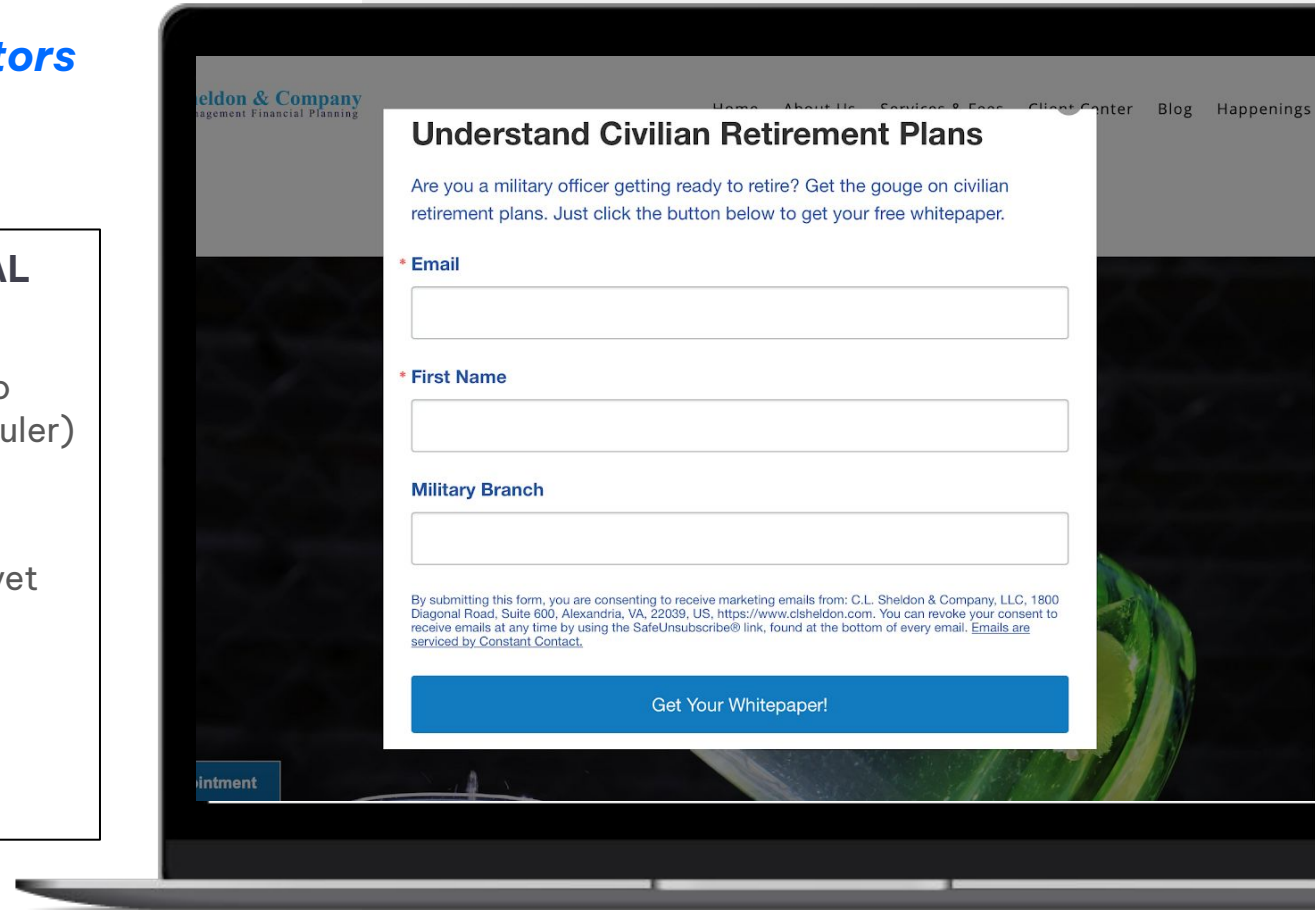
[LEARN MORE](#)

👉 **97% of website visitors do NOT convert!**

Calls to Action are CRITICAL

➡ **Primary:** For those ready to move forward (meeting scheduler)

➡ **Secondary:** For those not yet ready to meet with you



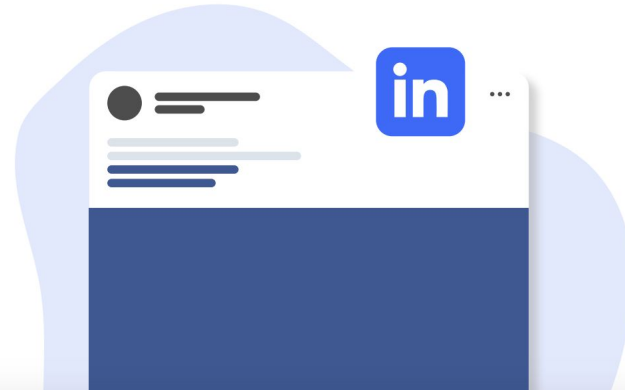
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SECTION 2

Social Media

Optimize your LinkedIn presence to **effectively engage a network of prospects**





Samantha Russell · You

Chief Evangelist at FMG Suite | Marketing + Finance+ Tech | Investment ...

3d · 🔄



If you are a financial advisor and your feed is filled with other financial advisors - you are doing LinkedIn wrong 😬

Here's what it should look like instead:

1. You are an advisor who helps small businesses with exit planning - Your feed should be filled with business owners, and content targeting the problems small business owners face.

2. You are an advisor who specializes in working with physicians - Your feed should be filled with physicians, hospitals, medical centers, residency programs, and the issues doctors face.



Daily & Weekly Habits:

Daily | 15 minutes

- Engage network by:
 - Engaging with relevant or thought provoking content
 - Leaving thoughtful comments
 - Sharing relevant content
- Interact with first AND second-degree connections

Weekly | 5 minutes

- Send connection requests to:
 - Anybody you recently emailed or met with this past week
 - Any networking event connections
- Personalize every connection request with a message!

Time-Saving Resources:


Content Generation Tools

- Third-party tools:
 - [Veed.io](#): Free AI video editor to add text to video, subtitles, and more
 - [Authored Up](#): Tool to create and analyze LinkedIn content to optimize profile performance
 - [Kleo](#): A free browser extension to help consume and create content on LinkedIn


FMG Mobile App is a free AI-driven tool to generate and share content with a simple click of a button.

[Learn More >](#)

Old Way: Tease Content → Share Link

 **Barron's Advisor**
7,101 followers
1d · 🌐

Choose your platform wisely, don't neglect video, and stay open to experimentation, counsels this marketing executive. <https://lnkd.in/eEqPnzha>
[#socialmediamarketing](#) [#financialadvisors](#)



A 5-Point Social-Media Plan for Your Firm
barrons.com · 4 min read

Now 

“ZERO-CLICK CONTENT”



Source: FMG's Content Library

 **Chris DeWolfe** · 2nd
Managing Partner at Investment Consulting G...
[Book an appointment](#)
2w · 

Are election years typically good years for the stock market?

For those who are curious, here's some interesting historical ...see more

S&P 500 Annual Stock Market Returns During Election Years

2000	-9.1%	Bush vs. Gore
2004	10.9%	Bush vs. Kerry
2008	-37.0%	Obama vs. McCain
2012	16.0%	Obama vs. Romney
2016	12.0%	Trump vs. Clinton
2020	18.4%	Biden vs. Trump

Stocks are measured by the Standard & Poor's 500 Composite Index, which is an unmanaged index considered to be representative of the overall U.S. stock market. Index performance is not indicative of the past performance of a particular investment. Individuals cannot invest directly in an index. The returns and principal values of stock prices will fluctuate as market conditions change. Shares, when sold, may be worth more or less than their original cost.

  3 2 comments

 Like  Comment  Repost  Send

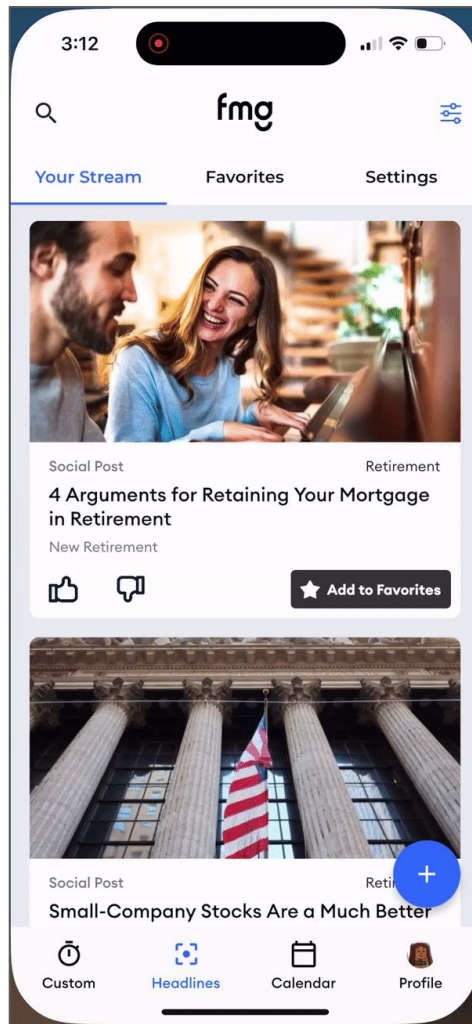
 Add a comment...  

Most relevant ▾

 **Frank Schiller** · 3rd+ 2w ...
First Director at Public Interests Research and Communicatio...
Great insights here on the US presidential election cycle and market trends. Valuable perspective on historical patterns and economic fundamentals over long-term investment strategies. Thanks for sharing!

Use AI to help you write zero-click content more effectively

At FMG: we created zero-click social media posts within our app to do it for you!



03



SECTION 3

Client and Prospect Communications

Strategically mix email and texting to **reach your clients and prospects**



75%

of clients left or considered leaving their advisor in 2023 due to infrequent communications*



Segment Your Audience

- Minimum segments: Clients and Prospects
- Advanced segmentation by:
 - Investing stage
 - Retirement proximity
 - Lifestyle interests
 - Specific financial goals
 - Hobbies or demographic characteristics

Email Best Practices

- Craft Compelling Subject Lines
 - Use attention-grabbing, value-driven language



Leverage free AI tools or subjectline.com for optimization

- Personalization Techniques
 - Address recipients by name
 - Tailor content to specific segment needs
 - Add a personal touch!

Timely Email Communications

Example: When to expect your 1099

DIFM Email - February

Title: When to Expect Your 1099

Subject line: When to Expect Your 1099

Audience: Clients & Prospects



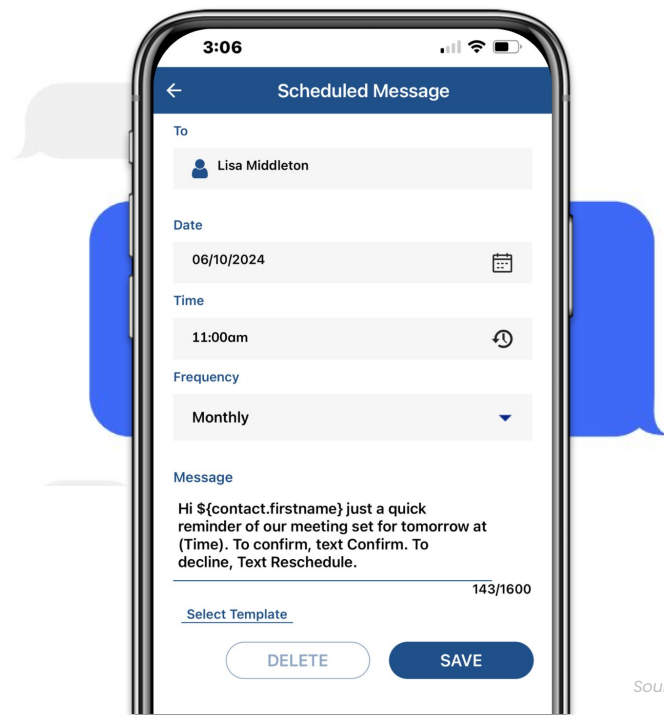
If you receive income from investments, dividends, education savings plans, or contract work, you're undoubtedly familiar with IRS Form 1099. By the time April 15th rolls around, you might have even collected a hefty stack.

Texting: Your Communication Accelerator

Email and texting combined can increase customer engagement by **10X****

Use texting for:

- **Rapid Document Completion:**
 - Text reminders get documents returned in 5 minutes ([MyRepChat](#) Internal Data, 2024)
 - Follow up on pending paperwork quickly
- **Appointment Management:**
 - Confirm meetings
 - Reduce no-shows
 - Provide easy rescheduling options
- **Instant Communication:**
 - Time-sensitive updates
 - Quick check-ins
 - Annual review scheduling



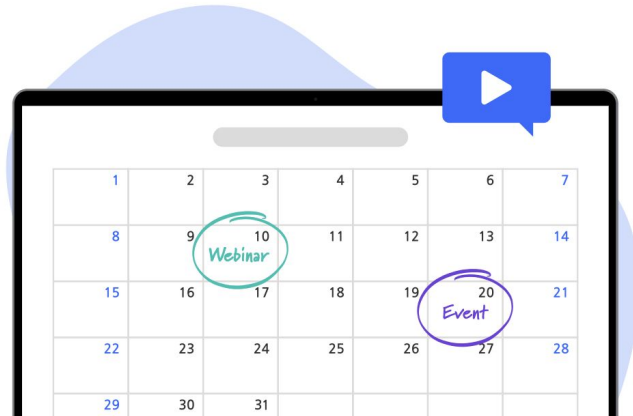
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SECTION 4

Events

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



Events: your BEST lead-gen
opportunity

Remarkable: Something so good that someone feels inclined to “make a remark” about it.

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 Tips

- Partner with Subject Matter Experts (SMEs) for a joint presentation
- Collaborate with Centers of Influence (COIs) to expand reach, add credibility and cross-promote
- Add fun giveaways or prizes during the live event to encourage attendance and participation
- Re-purpose the content and cut video snippets to use all year long on social media

Original Medicare
Offered by federal government

Part **A** helps cover

- Hospital
- Skilled nursing facility
- Hospice
- Home health

Part **B** helps cover

- Doctor appointments
- Outpatient care
- Occupational/physical therapies

Medicare 101 Webinar

**Want more people to
come to your event?**

Make it an event they
will actually want to
attend!

**Ex: Host a Family
Picture Day**



Event 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 date/time, select location, set budget and define 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 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.”*

FMG's Event Tool has your event covered from start to finish. From turn-key seminar content to automatic promotional communications and registration tracking.

[Learn More >](#)

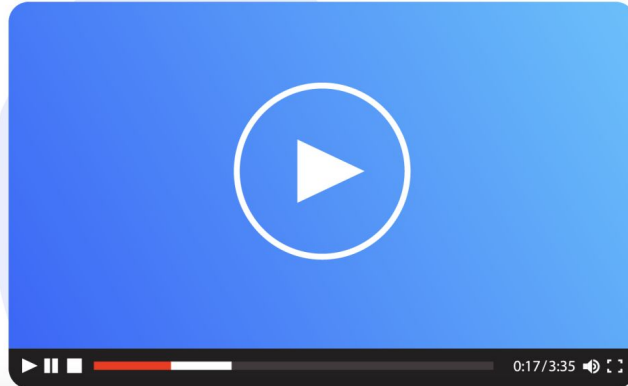
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SECTION 5

Video

Use videos to **engage with your audience personally and build trust**



How to Start Your Video: The Hook


- The first 5 seconds are CRUCIAL
- Don't introduce yourself first
- Start with a bold statement, fact or story
- OR, share exactly what someone will from watching the video



Samantha's **Quick Tip:**

[Start your video with a hook](#)

Example Hook Ideas

1. I've helped 100 people retire. Here's what most of them said they wish they'd done before retirement
2. Before you apply for social security, watch this
3. Scared about being bored in retirement? Try this
4. If you have RSUs, avoid a huge surprise tax bill with this tax planning strategy
5.  If you have a net worth over 2 Million, here's what you need to know before you retire

How to Record Your Video: Veed.io

- Add subtitles
- Put Text over video
- Cut sections
- Ai Tools
- Bring in images
- and more!

The screenshot displays the Veed.io video editing interface. On the left is a sidebar with icons for Settings, Media, Audio, Subtitles, Text, Elements, Record, Transitions, and Filters. The main area is titled 'Subtitles' and contains a list of subtitle entries with their start and end times. Below the list are controls for 'Back to Timeline', 'Split Subtitle', and 'Add Subtitle'. On the right is a video preview window showing a woman speaking with large white text overlays: 'Zero Click Content' and 'WHAT YOU NEED TO KNOW'. A subtitle is visible at the bottom of the video: 'How many times do you Google something and you get'. At the bottom of the interface is a timeline with a playhead at 00:05:2 and a word bank for transcription.

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

Timeline: 00:05:2

Word Bank: how many times, the answer to your, any web site, Google just, The search, You might not, of all Google searches now and, The re is, zero click content that Sparkforce, wonderf ul markets, And what I love, has nam ed, as market ers, All the social, on their platform, so they're, Inspira d of really, lead you to a, seen g peopl

Enhance regular email communications

Incorporating video leads to a **300% increase in email click-through rates**.*

- Add a personal message
- Use video content, such as FMG's Monthly Marketing Insights or Video of the Month to share expertise
- Add a video synopsis with your commentary of the content




79%

of consumers would rather watch a video about a product than read about it*

How to Share Your Video: Email

- Make sure you put {VIDEO} in subject line
- Choose a great thumbnail to get people to watch

Upload A Video



What should be on the homepage of your website?

Timestamp

6

Never Mind Select Thumbnail

Latest Activity



NOVEMBER 2024

LAST MONTH

LAST MONTH

Stocks notched solid gains in November, post-election enthusiasm

Stocks notched solid gains in November as post-election

The email preview card features a blue and teal abstract graphic on the left. It includes a speaker icon in the top right corner and a 'Close' button at the bottom center.

Close

This section provides data on email recipients, sent emails, and recipient responses. To manage recipients, you can choose another group, edit th

Marketing Can Feel Hard

Hopefully this makes it a bit easier!

Questions?

Want to learn more about FMG?

Email: marketing@fmgsuite.com

fmg

2025 Marketing Guide for Financial Advisors

