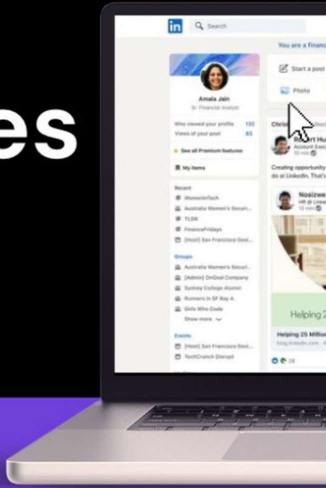
fmg

The 7 Biggest Social Media Mistakes That Advisors Make

Learn how Samantha grew to 37,000 followers in a few years.



Samantha Russell

Chief Evangelist, FMG

@SamanthaTwenty

/samanthacrussell

srussell@fmgsuite.com

An award-winning marketing suite.
Built just for you.

2024

#1 in Digital Marketing
T3 Advisor Software Survey 2024

Best Overall FinTech Software
FinTech Breakthrough Awards 2024

Practice Management Solutions Provider of the Year
Wealth Solutions Report 2024

2022 & 2023

Best Marketing Automation
WealthManagement Industry Awards 2022

Executive Leadership Award For Fintech Platforms
ThinkAdvisor Luminaries 2023

Top in Customer Satisfaction
MarTech Breakthrough Award 2019-2022

Our expertise is showing off yours.

#1

You don’t follow the 80-20 Rule

Follow the 80/20 Rule 👇👇

For every 1 thing you post to your own feed,

Comment on at least 5 other people's posts

5

Secret Tip: “Prime” the algorithm by leaving comments FIRST thing in the morning, BEFORE your post goes up.

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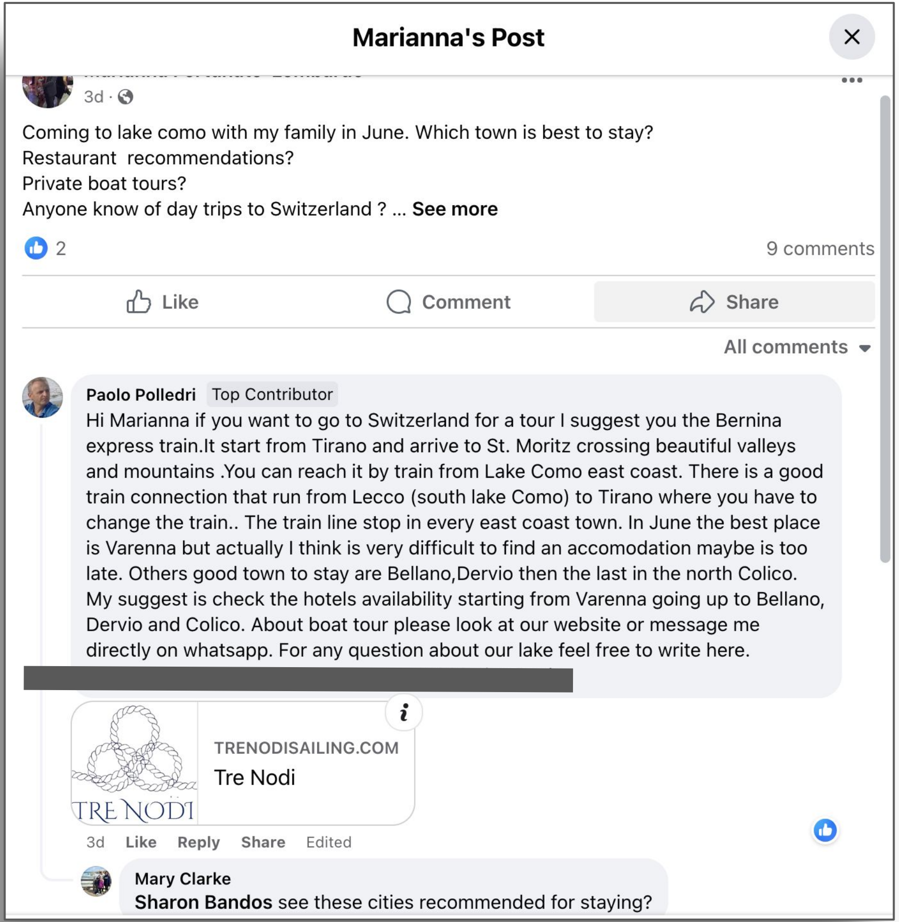
6

Helpful information is a like a 🧲

It draws people to ➡️ you


Marianna's Post

3d ·

Coming to lake como with my family in June. Which town is best to stay?
Restaurant recommendations?
Private boat tours?
Anyone know of day trips to Switzerland ? ... **See more**

2 | 9 comments

Like | Comment | Share

All comments

Paolo Polledri Top Contributor
Hi Marianna if you want to go to Switzerland for a tour I suggest you the Bernina express train.It start from Tirano and arrive to St. Moritz crossing beautiful valleys and mountains .You can reach it by train from Lake Como east coast. There is a good train connection that run from Lecco (south lake Como) to Tirano where you have to change the train.. The train line stop in every east coast town. In June the best place is Varenna but actually I think is very difficult to find an accomodation maybe is too late. Others good town to stay are Bellano,Dervio then the last in the north Colico. My suggest is check the hotels availability starting from Varenna going up to Bellano, Dervio and Colico. About boat tour please look at our website or message me directly on whatsapp. For any question about our lake feel free to write here.
[redacted]

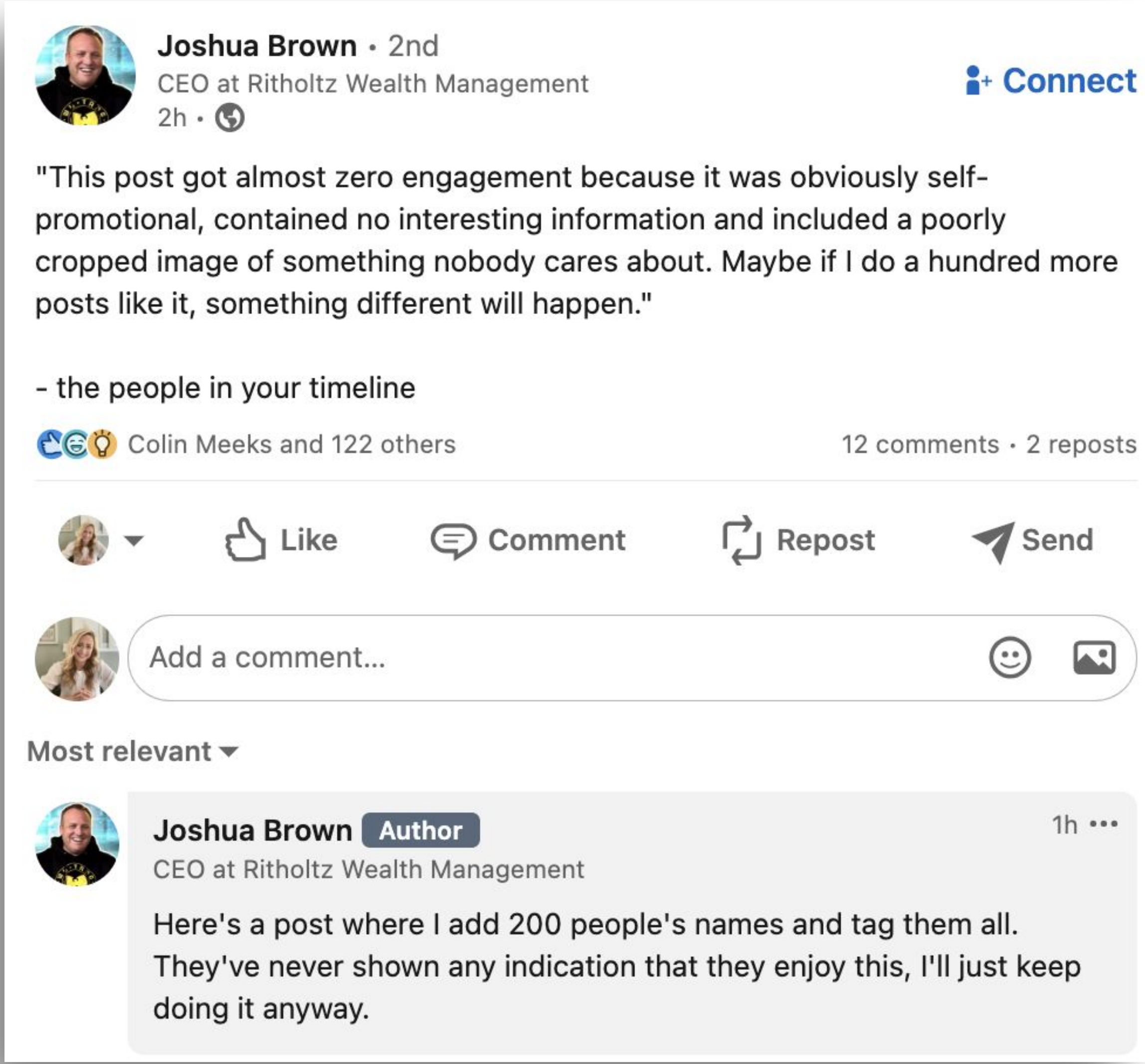
TRE NODI
TRENODISAILING.COM
Tre Nodi

3d Like Reply Share Edited

Mary Clarke
Sharon Bandos see these cities recommended for staying?

#2

You are Boring



Joshua Brown • 2nd
CEO at Ritholtz Wealth Management
2h •

Connect

"This post got almost zero engagement because it was obviously self-promotional, contained no interesting information and included a poorly cropped image of something nobody cares about. Maybe if I do a hundred more posts like it, something different will happen."

- the people in your timeline

Colin Meeks and 122 others

12 comments • 2 reposts

Like Comment Repost Send

Add a comment...

Most relevant

Joshua Brown Author
1h
CEO at Ritholtz Wealth Management

Here's a post where I add 200 people's names and tag them all. They've never shown any indication that they enjoy this, I'll just keep doing it anyway.

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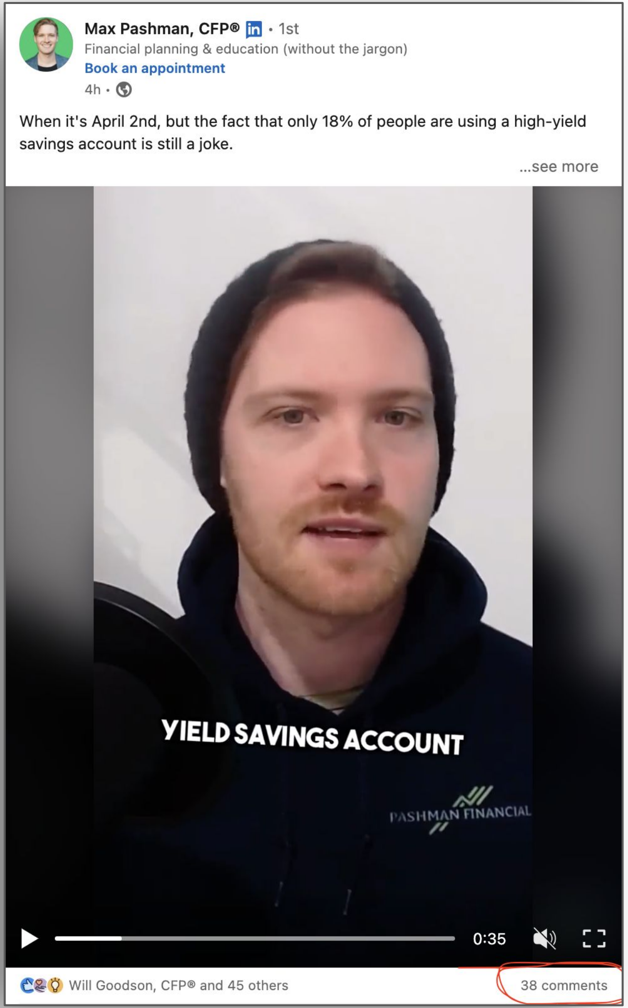
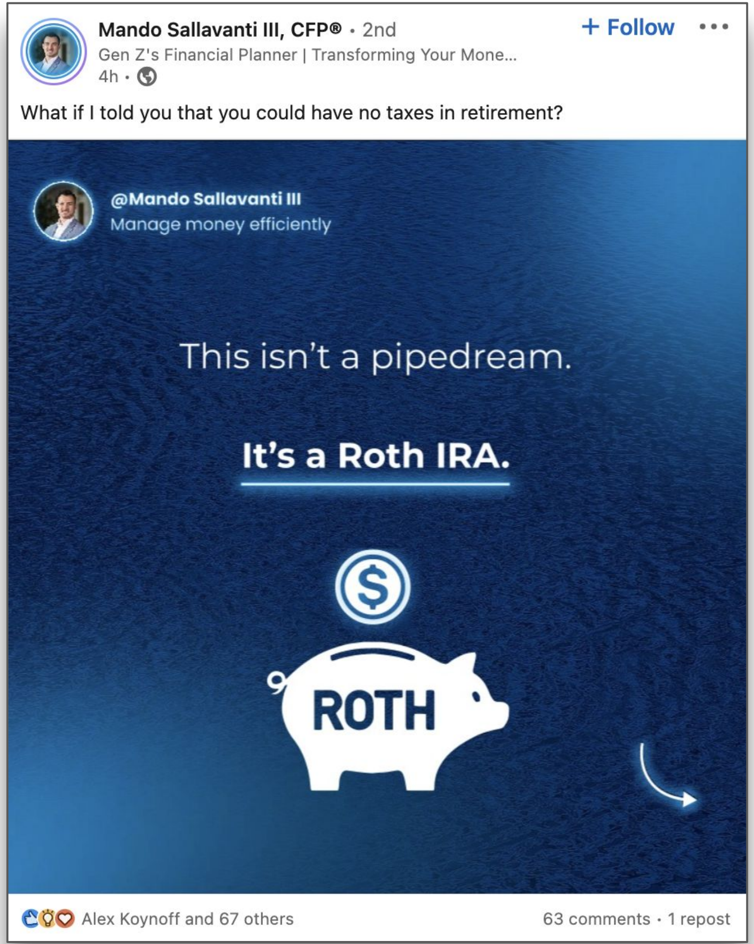
Humor goes a long way.





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Incorporate current events – what is everyone already talking about?

Source: This visual available in the FMG Social Content Library 👉

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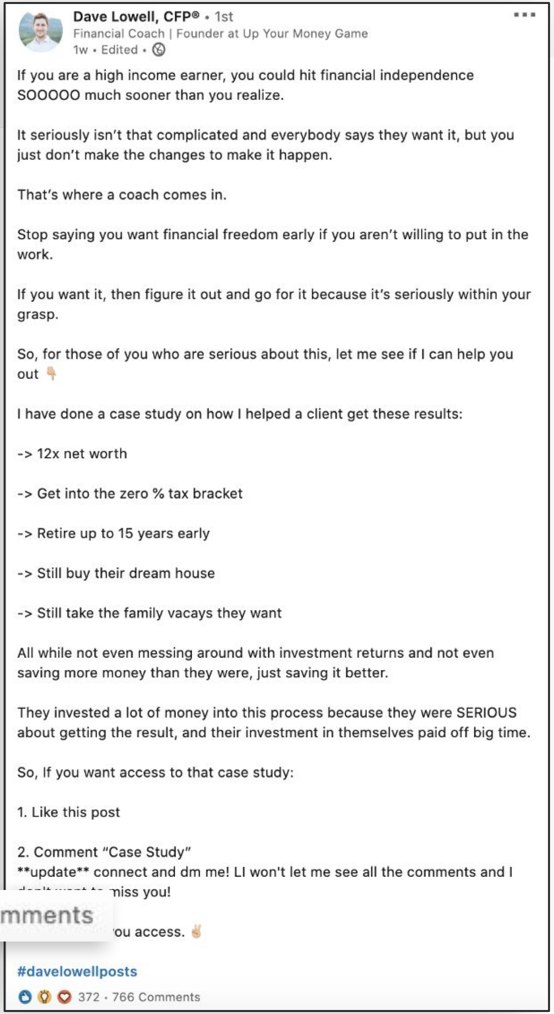
Financial Services Content is often BORING 😴

BUT it doesn't have to be.

This post got 766 comments



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What will be HELPFUL & INTERESTING for your audience to know or learn about?

What will people leave comments on or reshare?

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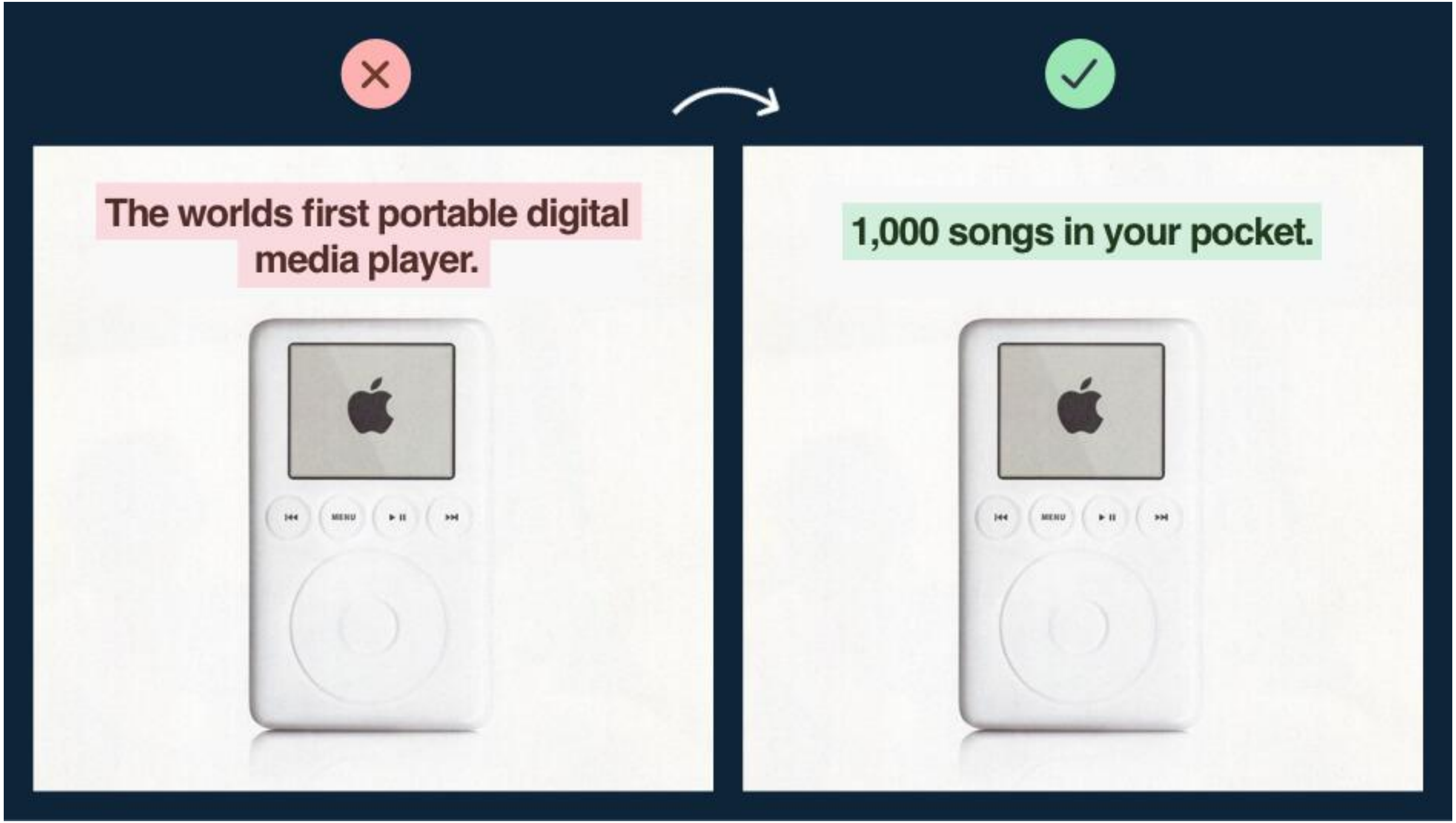
#3

You don’t use the WIIFM Mindset


The worlds first portable digital media player.
1,000 songs in your pocket.
MENU
MENU

fmg

Attention-grabbing headline

+

Good Visual

Jeff Hurst, CPA · 2nd
President at Hurst Financial Consulting LLC
Follow ···

Do you think your tax rate will be higher in the future?

Look at this chart by YCharts showing the historical tax rates for the lowest and highest tax brackets.

For the highest bracket, the historical average (not the high) is 57.69%, although we are currently at 37%.

Some believe that taxes may increase in the future. Here are the facts:

■ Higher tax rates may be part of any proposed solution to the current U.S. deficit.

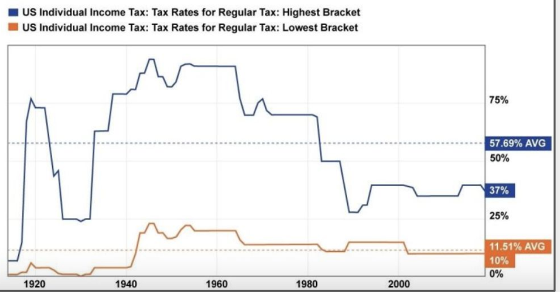
■ The time to manage your taxes is when you understand the current rates.

Every person's situation is unique, but as we approach year-end, a Roth IRA conversion for a portion of your retirement portfolio may be a strategy to explore a bit more.

A Roth IRA must meet a 5-year holding rule and occur after age 59 ½ for the tax-free and penalty-free withdrawal of earnings. Tax-free and penalty-free withdrawals can also be taken under certain circumstances, such as the owner's death. The original Roth IRA owner is not required to take minimum annual withdrawals.

This post is for informational purposes only and is not a replacement for real-life advice, so make sure to consult a tax professional before moving forward.

#RothConversion #RothIRA



Source: Jeff Hurst, CPA on LinkedIn (A FMG "Do It For Me" Customer)

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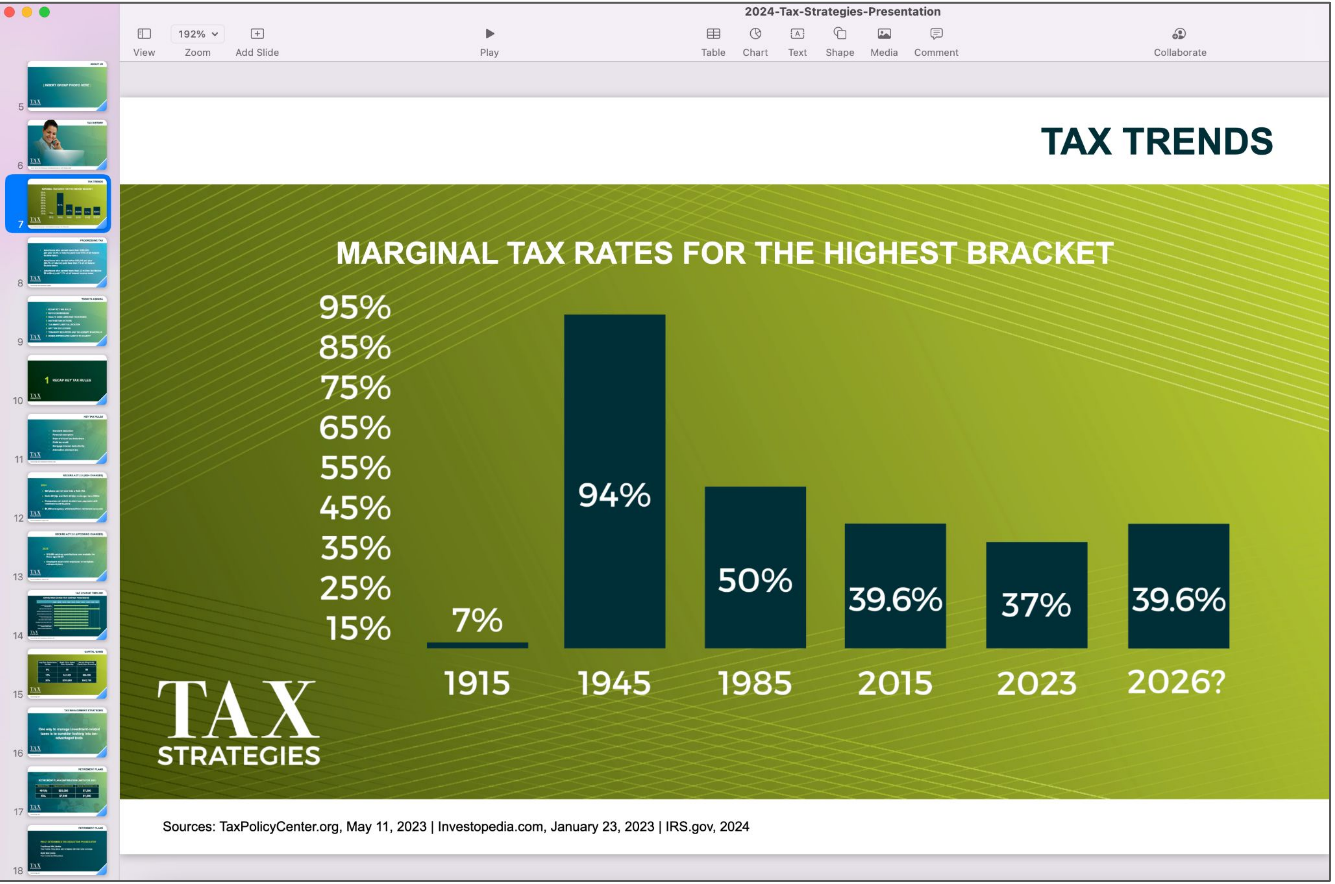
FMG "downloads" section has GREAT VISUALS



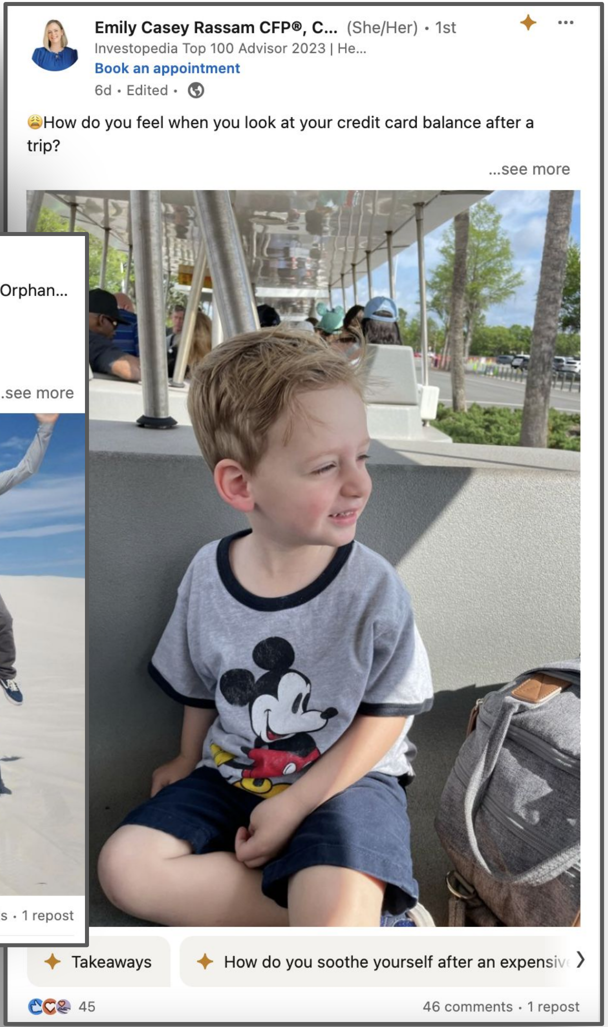
These slides also make for GREAT social posts!

Source: https://fmgsuite.com/features/events

#4

You never get personal

Share a personal story or photo, tie into how you help if you can



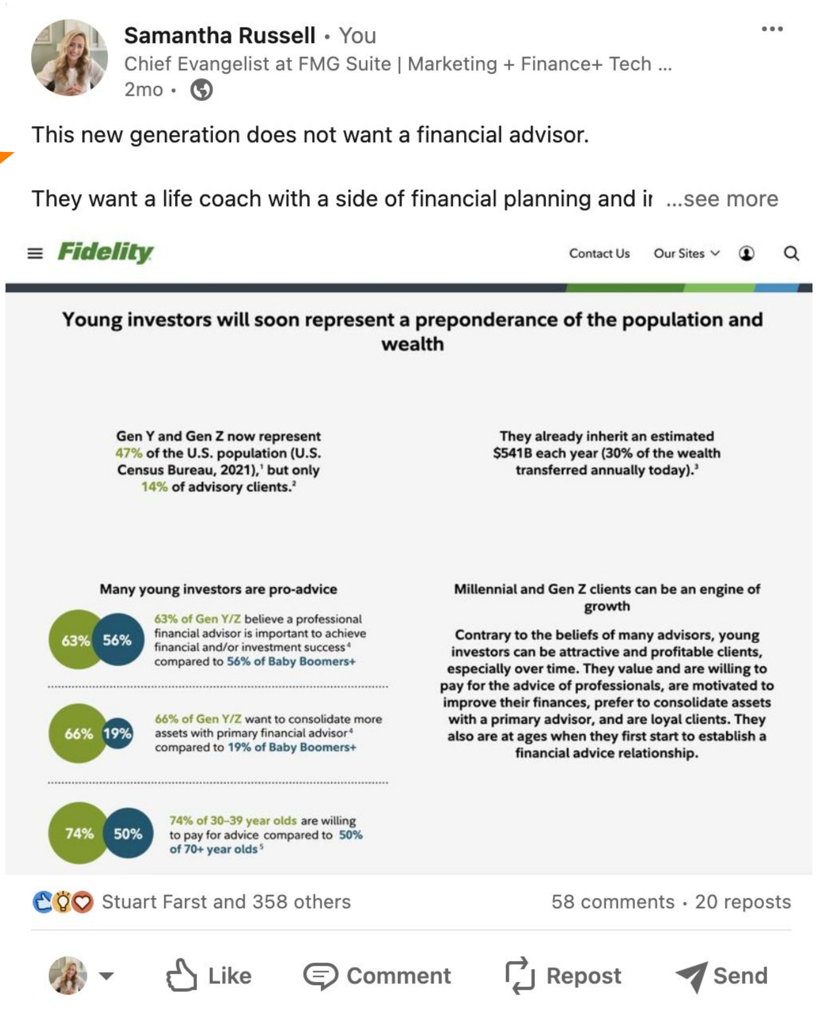
#5

You have no opinion

Make a bold statement.

Say something different.

Have a hook



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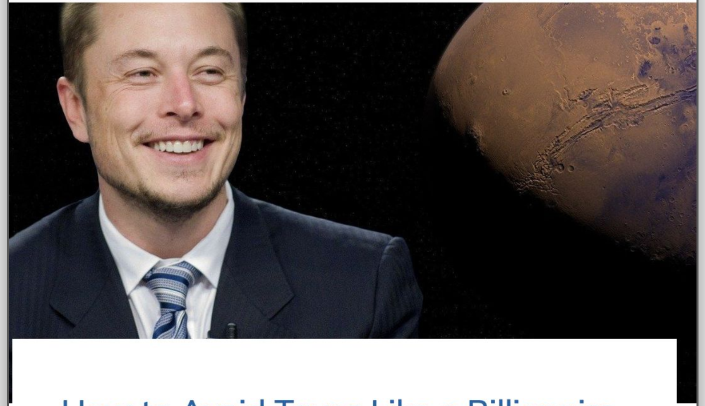
How you phrase things matters

QUARRY HILL
ADVISORS



How to Avoid Taxes Like a Billionaire

AUGUST 5, 2021

In June, Pro Publica revealed that they had somehow obtained tax records for many of the richest people in the United States including Jeff Bezos, Elon Musk, and Warren Buffett. To a financial planner, learning the details of how the billionaires do this is pure catnip. Their findings seemed shocking -- these billionaires somehow managed to pay only 3.4% in taxes on their skyrocketing wealth. For example, from 2014-2018 Warren Buffett's wealth grew by $24.3 billion, yet he only paid $23.7 Million in taxes. How could that be!?

Source: Quarry Hill Advisors

#6

You are not consistent

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Do It For Me Calendar | October

Monthly checklist

- Check out the content recommendations.
- The default is to send emails to ALL contacts and social posts to LinkedIn. If you want to select a more targeted group, let us know in your email reply.
- Reply to the email "Approved" and we'll get started on scheduling your marketing for the month!

Key

- Email (E)
- Social media (S)
- Blog (B)
- FMG automation

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
25	26 S: Rosh Hashanah	27 E: 10 Mistakes Derail (Prospects Only)	28	29	30 S: Good Morning Routines	1 S: International Coffee Day
2	3 S: Breast Cancer Awareness Month	4 E: Will Your SS Check Be Taxed? B: Will Your SS Check Be Taxed?	5	6	7 Monthly Market Insights	8
9	10 E: Cybersecurity Month: 7 Steps to Protect Yourself	11 S: Cybersecurity Month: 7 Steps to Protect Yourself	12 B: Cybersecurity Month: 7 Steps to Protect Yourself	13	14	15
16	17	18	19 E: Charitable Giving Strategy	20 S: Interesting Financial Education	21	22
23	24 B: The Pros & Cons of ESG Investing	25	26 S: What is Something You Splurge On?	27 E: The Pros & Cons of ESG Investing	28	29
30	31 Halloween S: Happy Halloween					

fmg | Do It For Me MARKETING

Hello,

Given the announcement today that the consumer price index rose 0.2% in June and was up 3% from a year ago, the lowest level since March 2021, we wrote the below Timely Social Post to demonstrate your thought leadership and reiterate the benefit of working with a financial advisor. We are happy to post this to social media on your behalf.

For Your Review & Approval:

Social Post: CPI Lowest in 2 Years

Please reply to this email to let us know if you would like the social post sent out! Include a note for the email to say:

1. **Social post is approved as is. Send it out!**
   (We will schedule this social post without changes. Note: there may be a lag if the post needs to be approved by your compliance team.)
2. **Social is approved with changes**.
   (Let us know what text changes you would like for the social post.)

Important Reminders:

- *If you have self-managed compliance, be sure you log into your FMG*

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REMEMBER: Follow the 80/20 Rule

👇👇

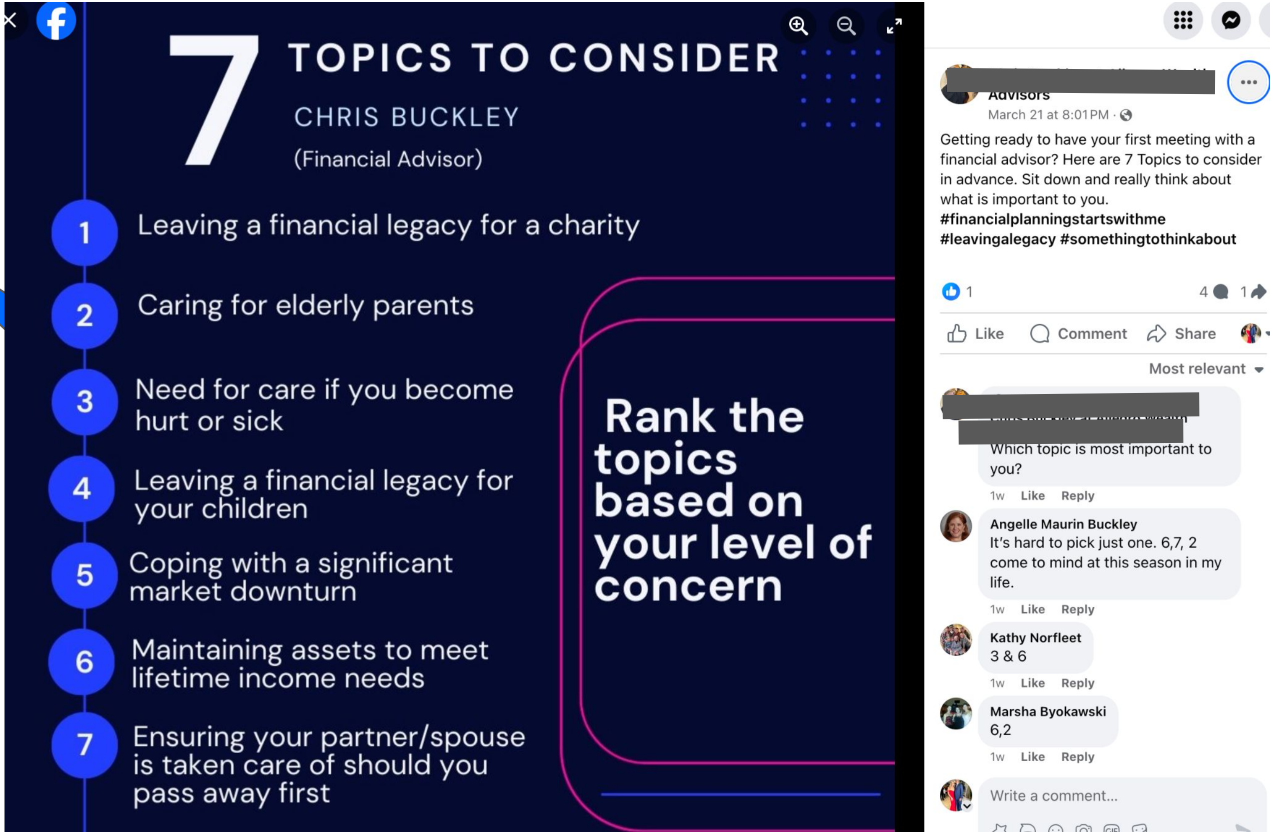
For every 1️⃣ thing you post to your own feed,

Comment on at least 5️⃣ other people's posts

25

Comments are currency.

Ask questions that are “easy” to answer to get more comments



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Get The Conversation GOING

Let's Talk About What You Wish You Knew Before Retiring:

"Those planning to retire - ask a question

Those already retired - answer one!"

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#7

You don’t tap into your (local, or niche) community

Facebook Groups are really underutilized by advisors.

There are local groups in every area in our country

fmg

Eric J. Negron, CEPA® · 1st 13h •••
Empowering Executives, Entrepreneurs, and Small Businesses to Red...

Samantha Russell I just dropped my Facebook group prospecting strategy on the EncorEstate Plans podcast with Matt Morris . We brought in 20 new clients last year leveraging Facebook groups with some unique tactics

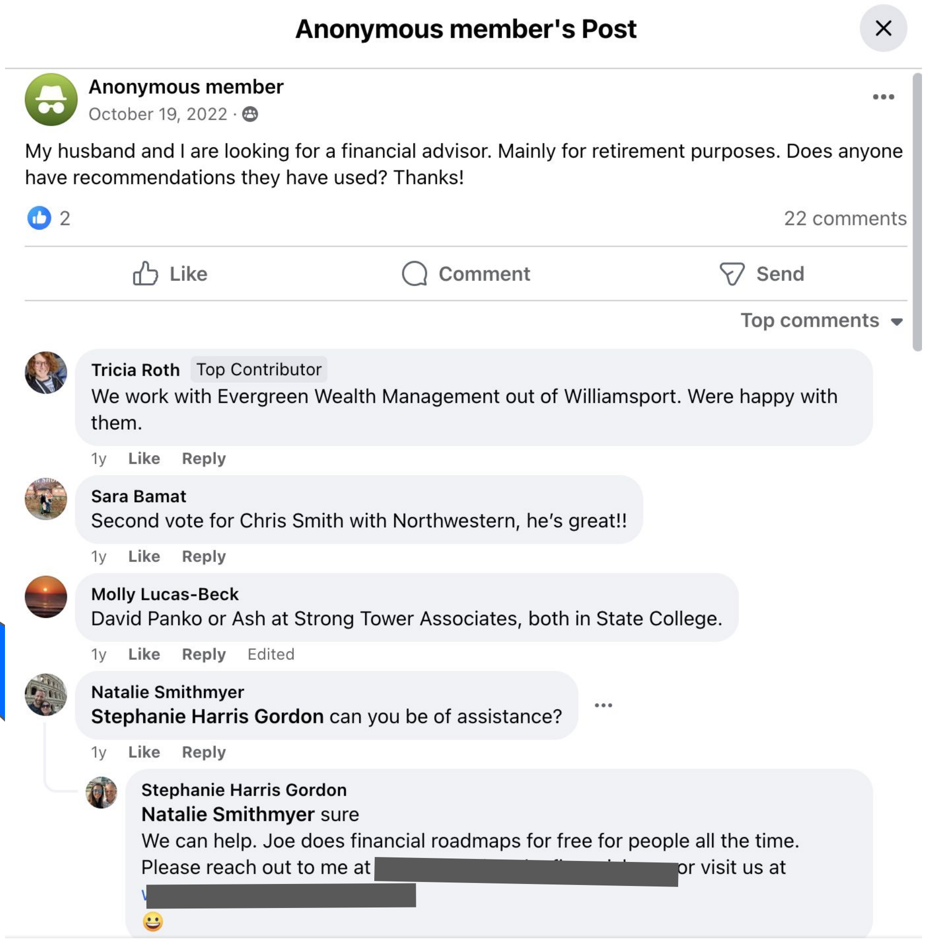
Caleb Pepperday, CFP® •••
@CalebPepperday

I've been the benefactor of this. It's really cool to see when your biz gets posted in a group that you're not even a part of. It's been a big referral source for me.

DO NOT SHAMELESSLY SELF PROMOTE.

Post helpful answers.

Also have colleagues tag you and say “Could you help?”



Thomas Cook
Top Contributor · March 11 at 7:53 PM ·

Thank you to everyone that came out Saturday to the exhibition match: Pickleball Pro vs Local Legends! I took notes from Tito's coaching that I'm willing to share if you just DM me. To say thank you to anyone that came out, I'm offering a free 2023 tax review which includes a tax summary you can keep with helpful observations on how to lower your lifetime taxes. Send me an email or book a meeting through my website. Info in comments.

Heather Medicare Majka, Gordon Young and 19 others

[redacted]
Top Contributor · March 4 at 9:38 PM ·

My husband and I are coming in on Thursday the 7th thru the 10th of March to tour Tellico Village and the surrounding area. What are some suggestions on fun places to see , night life and great places to eat.

You, Heather Medicare Majka and 11 others — 57 comments

Like — Comment — Send

Top comments

Write an answer...

Thomas Cook Top Contributor
Saturday March 9th there is an exhibition pickleball match at TV wellness center between the #39 player in the world and the best players at TV! Should be a well attended event if you want to make some friends. The pickleball community has the nicest people.

3w Like Reply — 3

Thomas Cook Top Contributor
12:30-1:30pm

3w Like Reply

Helpful tip: once you move from out-of-state, you'll want to update your estate planning documents to reflect TN laws. KG&B is the best firm in town in my opinion (no affiliation with them). I'm teaching a free course on estate planning at the

Great Example of how to use Facebook Groups: Thomas Cook

fmg

Practical Tips: Your Profile

Chris DeWolfe • 2nd

Managing Partner at Investment Consulting G...

Book an appointment

2w •

+ Follow ...

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

NEW: Add a CTA to your Linkedin Profile - it is a link that will ALWAYS appear under your name

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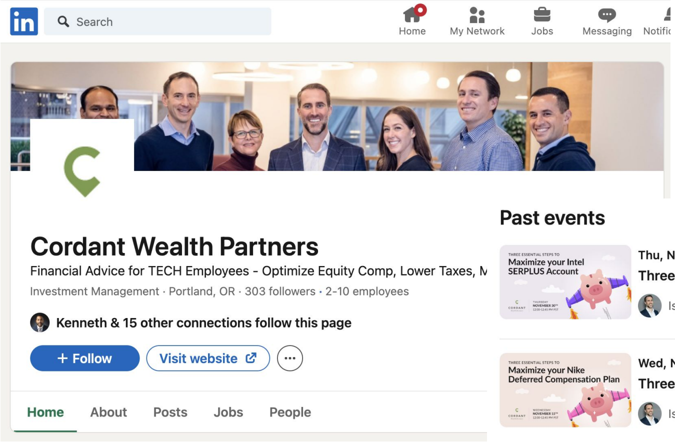
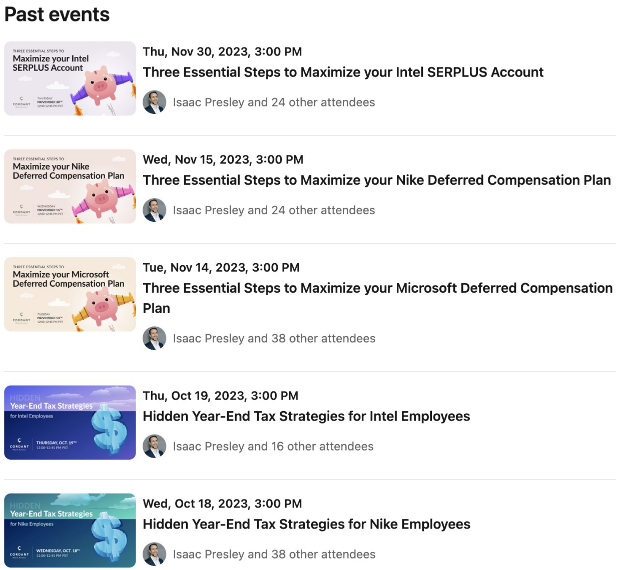
NEW: Create a LinkedIn Event To Promote Webinars

- Create an event for each individual webinar
- You can invite people directly FROM linkedin and they REGISTER from Linkedin
- Connected to 500 Nike employees? Filter and invite them all
- You can still use ZOOM to host





fmg

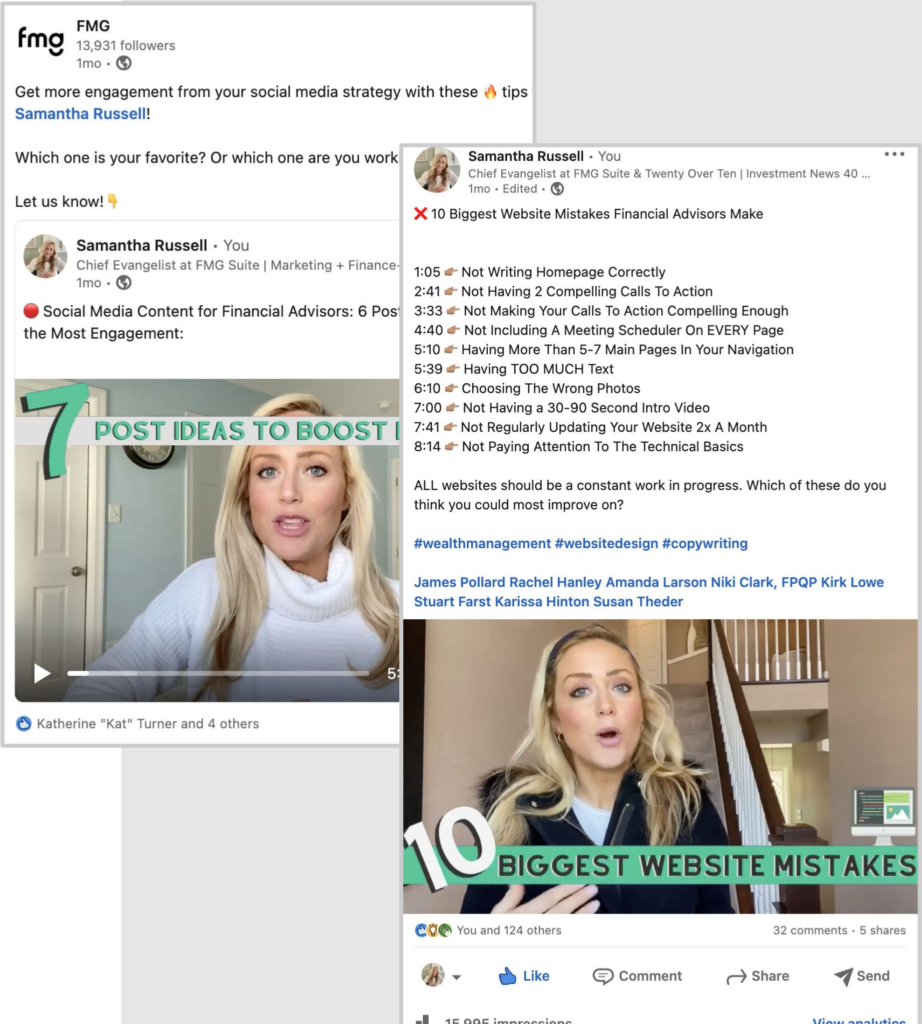
Source: https://www.linkedin.com/company/cordant-wealth-partners/

1. Set Up Personal AND Business Pages

Step 1: Claim your business name/profile on BOTH regardless

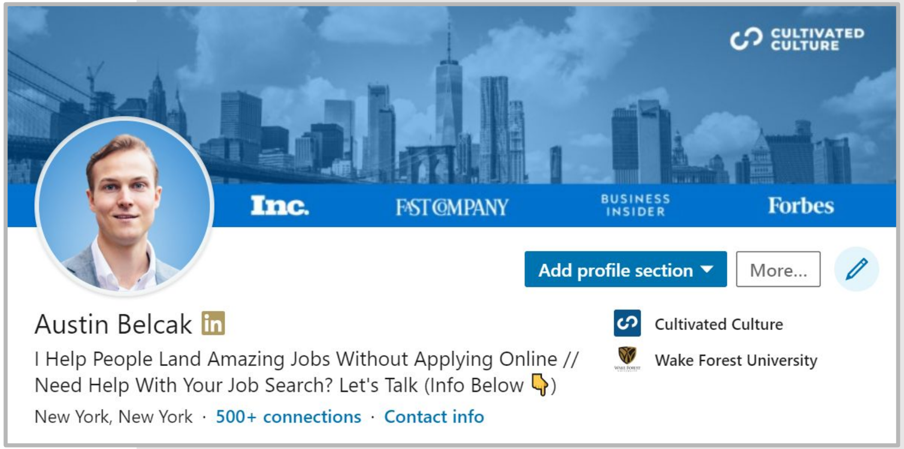
Step 2: Establish a face for your brand

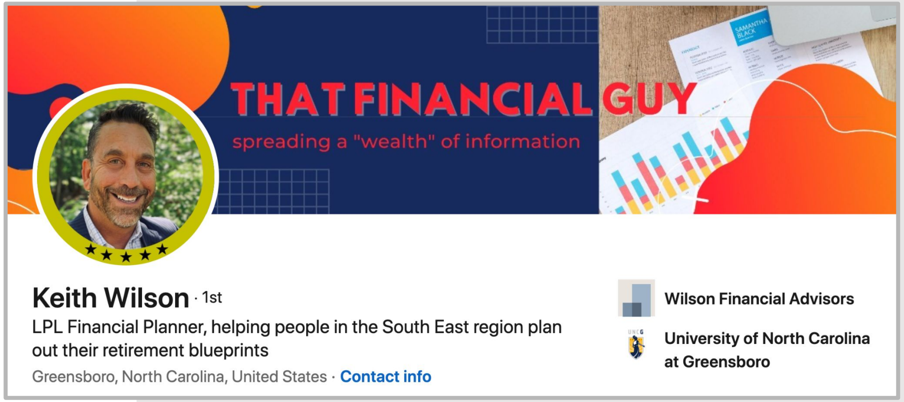
Step 3: Have employees/personal pages share content that tags the business page, or re-share content from business page. Expect Personal page to perform better



2. Upload an A+ Headshot & Banner Image

1. Use a **high-resolution image**
2. Make sure photo LOOKS like you
3. **SMILE** (show your teeth)
4. Wear what'd you'd wear to work
5. Take the photo in **natural light**
6. Create a **Custom Banner Image** using Canva (1128 (w) x 191 (h) pixels)
7. **Choose a template here:** https://www.canva.com/linkedin-banners/templates/





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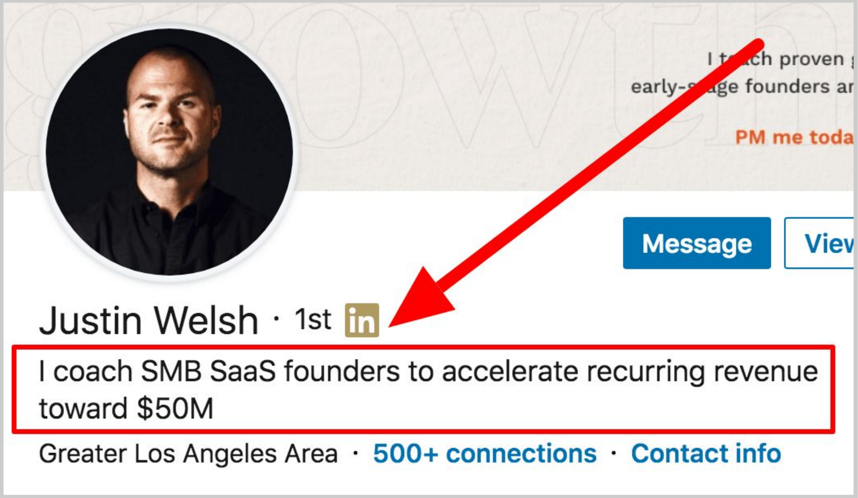
3. Write a Great Headline

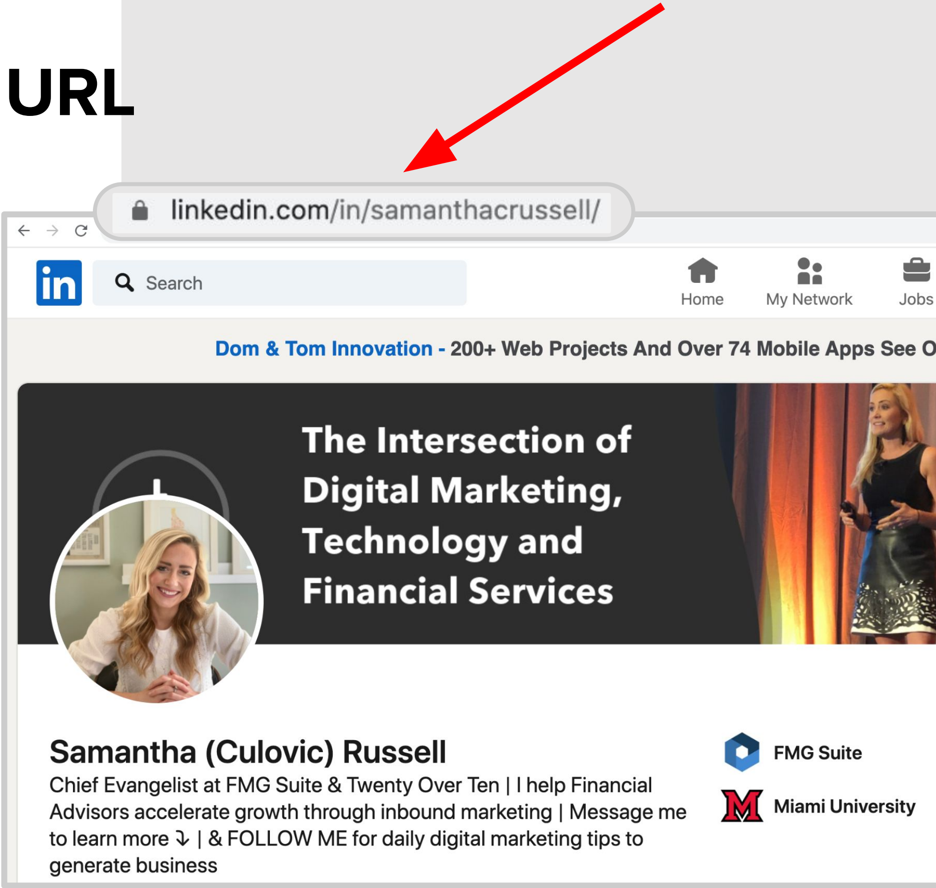
1. Articulate your unique value.
   "I help people ____________________ and my approach is different because ____________________."
2. Use the 120 Characters wisely!
3. Don't be gimmicky



Practical Tips: Growing

4. Personalize your LinkedIn URL

1. Follow [these instructions] to personalize
2. Best to edit for SEO purposes
3. A good URL may contain just your name, your name plus your title, or your name plus your certification.



Examples:

- http://www.linkedin.com/in/AllenJohnson
- http://www.linkedin.com/in/AllenJohnsonFinancialAdvisor
- http://www.linkedin.com/in/AllenJohnsonCFP

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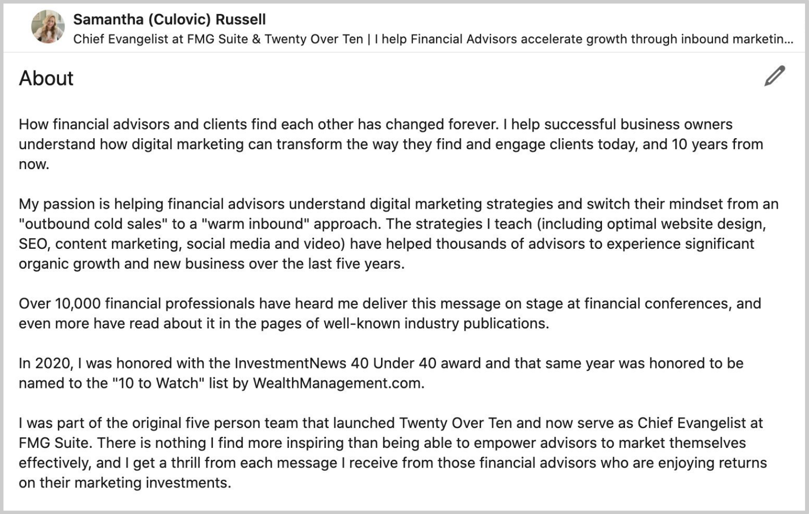
5. Turn Your Summary Into Your Story

1. **NEVER** leave the summary section blank!
2. Don't just list jobs + skills. Tell your story
3. Bring to life why your skills matter – and the difference they make to the people you work with.
4. Write in **1st Person!**
5. Don't forget the "Featured" section - highlight awards, your best content, etc


Samantha (Culovic) Russell
Chief Evangelist at FMG Suite & Twenty Over Ten | I help Financial Advisors accelerate growth through inbound marketin...

About

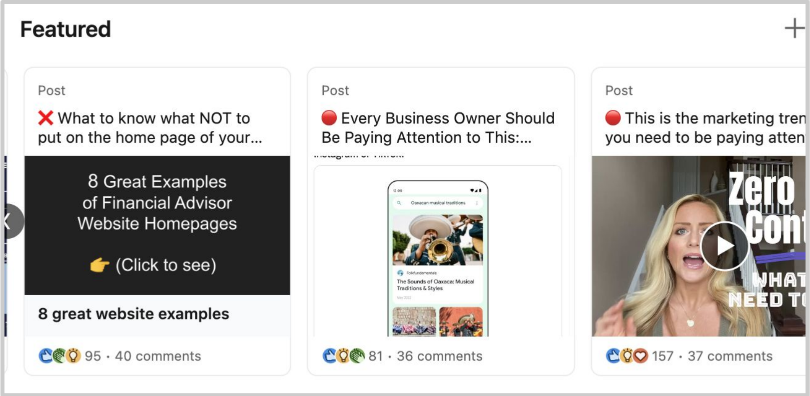
How financial advisors and clients find each other has changed forever. I help successful business owners understand how digital marketing can transform the way they find and engage clients today, and 10 years from now.

My passion is helping financial advisors understand digital marketing strategies and switch their mindset from an "outbound cold sales" to a "warm inbound" approach. The strategies I teach (including optimal website design, SEO, content marketing, social media and video) have helped thousands of advisors to experience significant organic growth and new business over the last five years.

Over 10,000 financial professionals have heard me deliver this message on stage at financial conferences, and even more have read about it in the pages of well-known industry publications.

In 2020, I was honored with the InvestmentNews 40 Under 40 award and that same year was honored to be named to the "10 to Watch" list by WealthManagement.com.

I was part of the original five person team that launched Twenty Over Ten and now serve as Chief Evangelist at FMG Suite. There is nothing I find more inspiring than being able to empower advisors to market themselves effectively, and I get a thrill from each message I receive from those financial advisors who are enjoying returns on their marketing investments.



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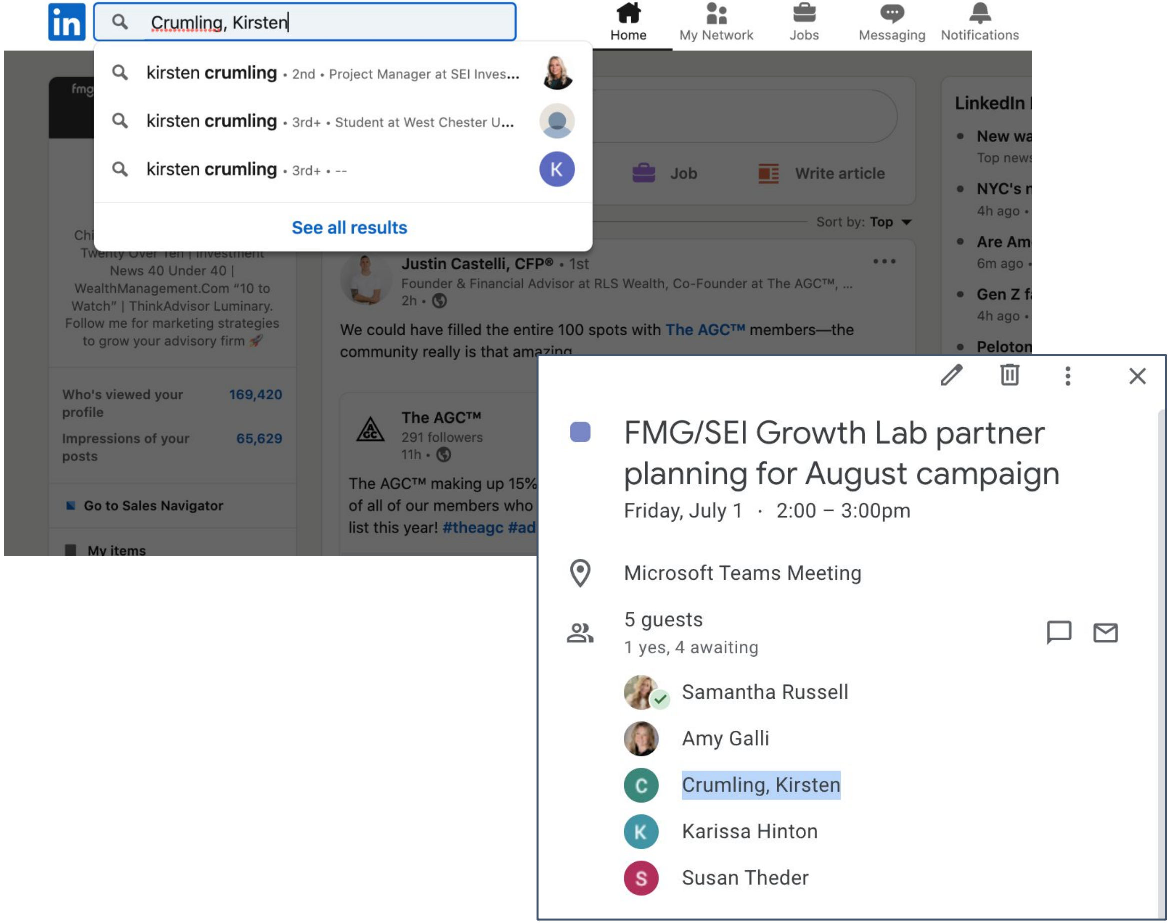
The Calendar Connection Tactic

Step 1
Every Friday, Go through the last 5 days of your calendar (and email too if you want extra connections!)

Step 2
Copy the person's name, look them up via Linkedin

Step 3
Invite them to connect on LinkedIn- that's it!



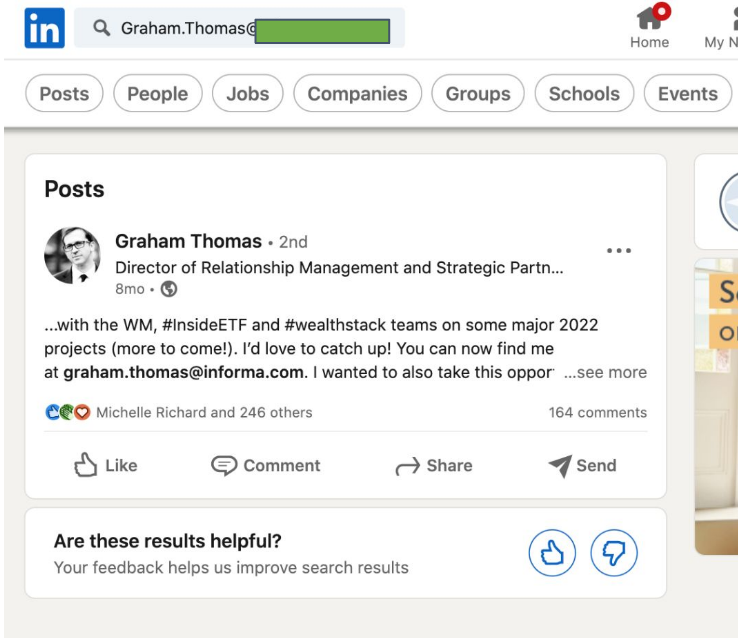
fmg

The Email Connection Tactic

Step 1
Every Monday and Friday, Go through the last few days of emails and connect with anyone you exchanged messages

Step 2
Copy the person's email address, search in LinkedIn

Step 3
Invite them to connect on LinkedIn- that's it!



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FMG Can Help

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Do It For Me Calendar | April 2024

Check out the content recommendations.

The default is to send emails to ALL contacts and social platforms that are connected.
If you want to select a more targeted group, let us know in your email reply.

Let us know if you've added any new clients this month so we can be sure to send them the New Client Welcome Series and add them to your ongoing campaigns.

Key

- Email (E)
- Social media (S)
- Blog (B)
- FMG automation

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATU
31 Easter	1	2 B: Give Your Children the Gift of Financial Literacy S: April Is National Financial Literacy Month	3 E: Empower Your Children with Financial Literacy Skills	4	5 Monthly Market Insights S: Financial Friday: Tips for Teaching Children & Teens	6
7	8	9	10 S: National Siblings Day	11		
14	15 **Tax Day** S: Tax Day: April 15, 2024	16 Video of the Month B: Create a Strategy to Protect Your Wealth with Potential Estate Tax Changes Looming S: National Healthcare Decisions Day: April 16	17 E: TCJA - Impact on Estate and Gift Strategies	18		
21	22	23 S: Motto for April	24	25		

Blogs

- April 2: Give Your Children the Gift of Financial Literacy
- April 16: Create a Strategy to Protect Your Wealth with Potential Estate Tax Changes Looming

Emails

- April 3: Empower Your Children with Financial Literacy Skills – COI Version
- April 17: TCJA - Impact on Estate and Gift Strategies – Clients and Prospects
- April 17: TCJA - Impact On Estate And Gift Strategies – COI Version

Social Posts

- April 2024 DIFM Educational Social Sequence
  - April 2: April Is National Financial Literacy Month
  - April 10: National Siblings Day
  - April 15: Tax Day: April 15, 2024
  - April 16: National Healthcare Decisions Day: April 16
  - April 23: Motto for April - HOPE - Have Only Positive Expectations
- April 2024 DIFM Financial Friday Tips Social Sequence
  - April 5: Financial Friday: Tips for Teaching Children & Teens About Finances
  - April 12: Financial Friday: Social Security Month
  - April 19: Financial Friday: TCJA and The Impact on Estate & Gift Strategies
  - April 26: Financial Friday: Preparing for Homebuying Season

FMG Automation

- Monthly Market Insights – Social Post and Email: Around the 7th of Each Month
- Video of the Month – Email Only: Third Week of Each Month

Additional Content Options – these can be used in addition to or swap out with other social posts

Social Posts

- April 1: April Fools' Day
- April 2: World Autism Awareness Day
- April 7: World Health Day
- April 8: National Library Week
- April 22: Earth Day
- April 22: Passover
- April 24: Administrative Professionals Day
- April 26: Celebrate Arbor Day: April 26, 2024
- 4 optional timely social posts (social assists) per week

Optional Email

- April 29: DIFM Prospect Email re: Customer Experience

Every Month Add New Clients To:

- New Client Welcome Series
- Center of Influence Campaigns
- Monthly Market Insights
- Birthday

Don't Forget About...:

- Prospect Email Sequence

View Complete List of All DIFM Blogs Here
View Complete List of Niche/Special Content Here

Marketing Tip:

- Surprise and delight the tax professionals and CPAs in your network. It's their busiest time of the year and dropping off or sending a food basket would be sure to make an impact. Or try Goldbelly to ship delicious food from anywhere in the country! It's an opportunity to show you're thinking about them that will likely pay dividends down the line!

All content and timelines are subject to your Broker/ Dealer compliance and approval.

Willing to give a testimonial about DIFM? We would love that! Please click here for more information.

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Advisors ❤️ Love Our "Do It For Me" Program

We got a client because of you guys. They were reading the emails you sent out, they made an appointment, and we are working together - a million dollar client. Just keep doing what you're doing. I'm not on the FMG calls so I don't know what it is, but it's definitely working. ~ *Henry H., March 2024*

Meet With Us: https://fmgsuite.com/get-a-demo

Questions? Marketing@fmgsuite.com

Scan QR To Talk With US