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Our expertise is showing off yours.



A New Look For a New ERA

Current Events

library. Regularly updated.

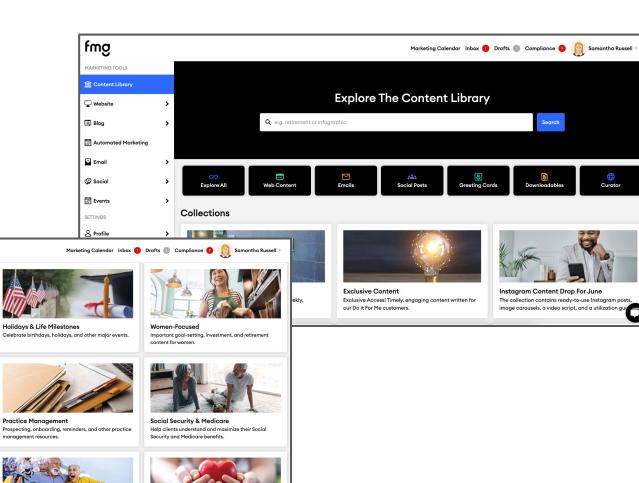
Staff Recommendations

library.

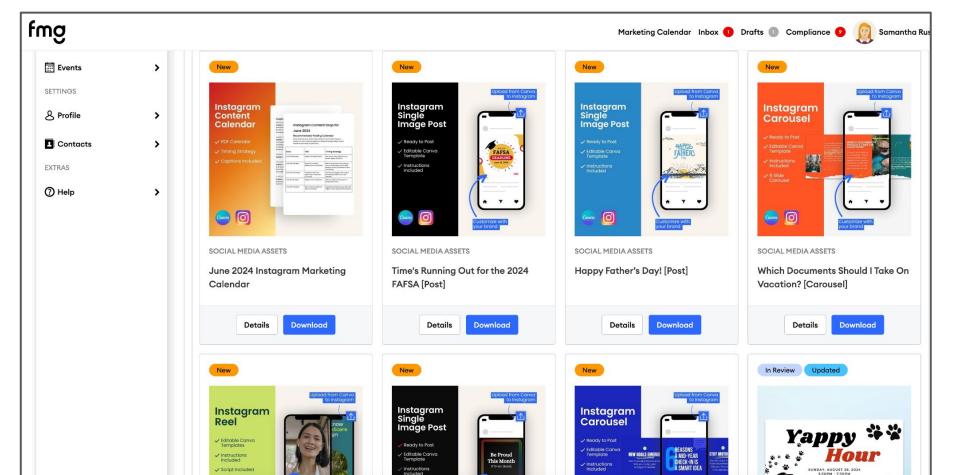
The newest and most relevant pieces from our content

Favorite selections from our award-winning content

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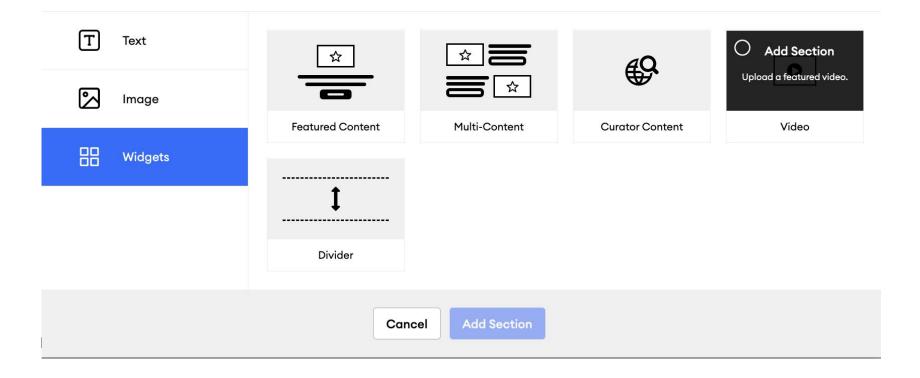
Instagram!

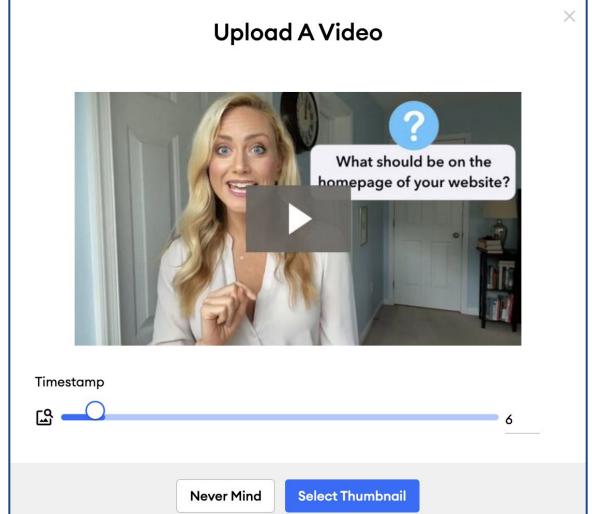


Video Emails!

Add A New Custom Email Section

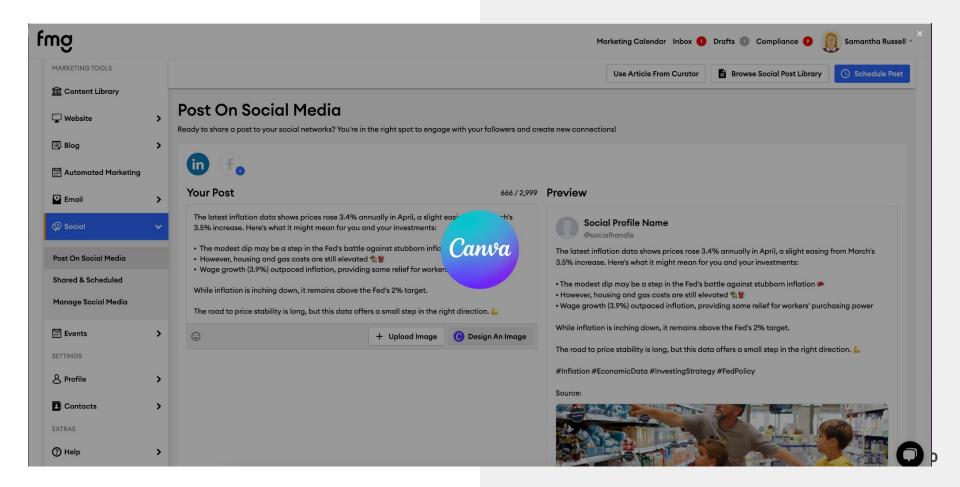
What type of content do you want to add?



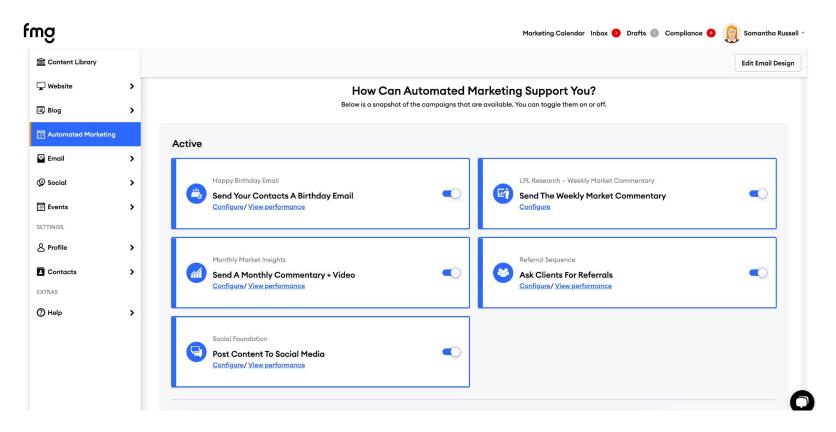




Canva!



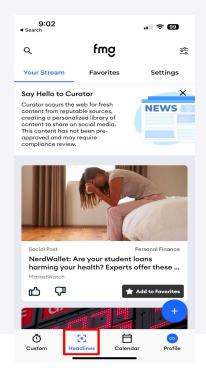
Email Automations!





Al Generated Captions + Mobile App!

 Browse and Choose Your Content



- 2. Add Your Caption
 - Write Your Own Text
 - Write Text For Me

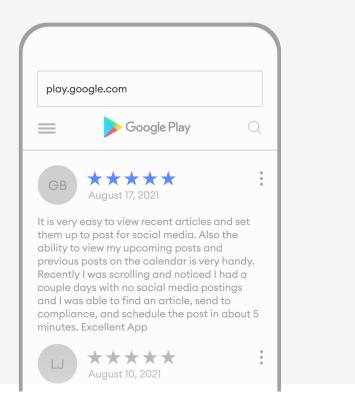




Download the FMG App:



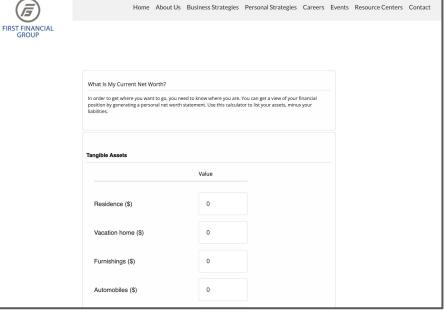






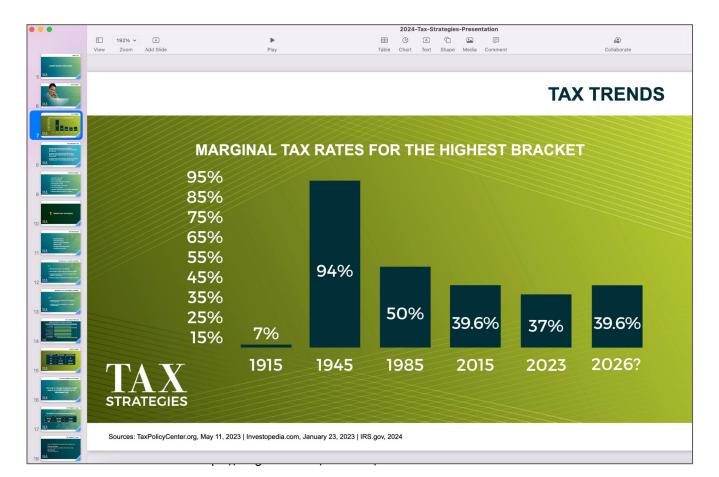
Interactive Quizzes!







Slide Decks + Event Assets!





Estate Planning Resources!

ESTATE PLANNING ARTICLES



When Heirs are Imperfect

The money problems or bad lifestyle habits of adult children could lead to the squandering of any inheritance they receive.

LEARN MORE



Four Reasons Millennials Need an Estate Strategy

Estate strategies for millennials may sound like less of a concern than retirement, but young adults should prepare now.





sors.com/resource-center/estate/yours-mine-and-ours-estate-strategies-for-second-marriages

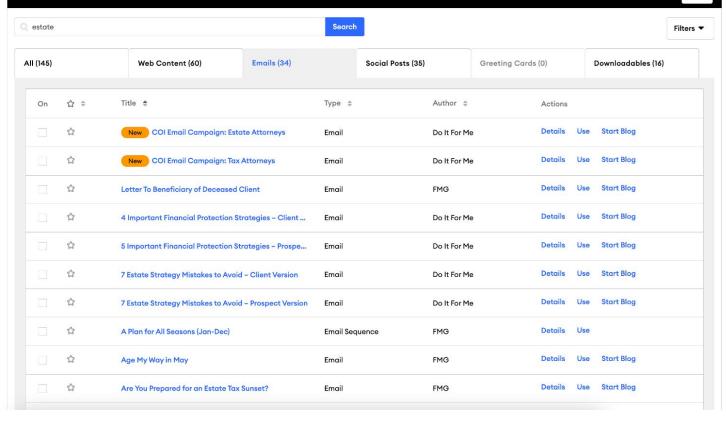


GET MY FREE GUIDE



Estate Planning Email Ideas from FMG





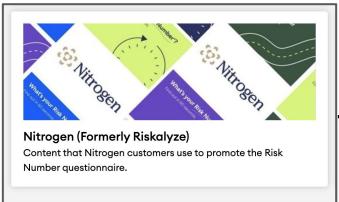


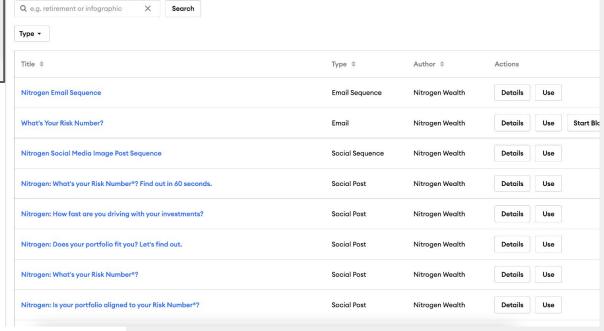
COI Email Campaigns!

All (2458)		Web Content (439)	Emails (532)		Social Posts (998)	Greeting Cards (265)	Downloo	adables (224)
On	☆ ≑	Title \$		Type \$	Author \$	Actions		
	☆	New COI Email Campaign: Busin	ness Brokers	Email	Do It For Me	Details	Use Start E	Blog
	☆	New COI Email Campaign: CPA	s	Email	Do It For Me	Details	Use Start E	Blog
	☆	New COI Email Campaign: Divo	rce Attorneys	Email	Do It For Me	Details	Use Start B	Blog
	☆	New COI Email Campaign: Esta	te Attorneys	Email	Do It For Me	Details	Use Start B	Blog
	☆	New COI Email Campaign: Gene	eral Practice Atto	Email	Do It For Me	Details	Use Start E	Blog
	☆	New COI Email Campaign: Insur	rance Agents	Email	Do It For Me	Details	Use Start E	Blog
	☆	New COI Email Campaign: Tax A	Attorneys	Email	Do It For Me	Details	Use Start E	Blog
	☆	New COI Email Campaign: Trust	t Underwriters	Email	Do It For Me	Details	Use Start E	Blog



Nitrogen (Riskalyze) Lead Gen + Email Drip Campaigns!







Do you know what you are sending via email, posting to social or adding to your website this week?

What about this month?

Not having a plan is planning to fail

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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	
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Email (E)

Social media (S)

Blog (B)

FMG automation

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
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 About Finances	6
7	8	9	10 S: National Siblings Day	n	12 S: Financial Friday: Social Security Month	13
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	19 S: Financial Friday: TCJA and The Impact on Estate & Gift Strategies	20
21	22	23 S: Motto for April	24	25	26 S: Financial Friday: Preparing for Homebuying Season	27

Do It For Me Marketing Program

Outsource what you can, so you have time to do the things only YOU can do.



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

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

Marketina 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.



Hello.

With continued coverage of banking issues and what The Federal Reserve is doing to help, your clients and prospects are likely looking to you for information. To help you reach out proactively, we wrote a short email to address the news and reiterate that you are available for those who would like to talk. We are happy to send this email out to your clients and prospects on your behalf.

For Your Review & Approval: Fed Managing Banking Issues, Inflation

Please reply to this email with one of the following:

- 1. Email is approved as is. Send to all contacts!
- (We will schedule this email without changes. Note there may be a lag if it needs to be approved by your compliance team.)
- 2. Content is approved with changes.

(Let us know what text changes you would like for the email.)

3. Content is not approved.

(Nothing will be scheduled.)

Important Reminders:

- If you are not using ALL CONTACTs, please name the group(s) you would like us to email.
- If you have self-managed compliance, be sure you log into your FMG account to approve pending items so they are sent in a timely manner.
- Please note that if you do not reply to this email, we will not send anything.





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

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Scan to learn more and enter to win 3 months free of DIFM!



Do It For Me Program Content Sample - Estate Planning Email Drip Series

Brought to you In partnership with Wealth.com

Email #1

Subject

Here's why you shouldn't wait to create an estate strategy

Boo

Legacy is a significant aspect of any financial strategy. It's important to consider what happens to everything you've accumulated—and may continue to accumulate—throughout your lifetime. But far too often, we've seen this as something overlooked. Even as recently as 2023, <u>barely one-third of Americans had wills</u>.

Often, the lack of an estate strategy (even a will) is for a seemingly valid reason: People don't know how to get started. Or they believe it's a complicated process. Or they don't think they have enough assets to need one.

But creating an estate strategy is about more than just knowing what will happen with your stuff. It can help...

- Manage complexities associated with your estate.
- Provide a backup decision-maker in case you become incapacitated.
- Define who you want your beneficiaries to be.
- · Define family members you don't want to be beneficiaries.
- Have an approach to what happens to any pets you have.
- Help manage family infighting after you're gone.
- Guide your beneficiaries, and create a structure for your children.
- · Put an outline in place for any scenario where you're unable to make decisions.

Whether you're newly married, starting a family, or nearing retirement, an estate strategy is likely something on your mind. But even if you're early on in your career and haven't hit any of these milestones, considering an estate strategy can be important.

Some elements of an estate strategy can include a(n)...

Last Will & Testament: This document defines your wishes after you pass. This includes naming your
executor or a personal representative who would represent your estate before the probate court and
outlining what you'd like to happen to any minors or anyone else requiring guardisnship (like someone
with special needs). A will also describes how you want your property and other assets to be
distributed.

al Power of Attorney: This assigns to someone the right to make financial decisions for you, ing documents or making financial transactions, should you become incapacitated or otherwise to do so yourself.

e- Health Care Directive: This empowers the person you designate to make decisions about idical treatment, including end-of-life care. In addition, this document often specifies what care isions you wish for in certain medical situations.

a Trust to your strategy: A trust is an agreement with a set of rules that the creator of the up) puts in place for the person you designate to oversee the trust [the trustee), including how it your property and possessions to be divided and who you want in charge of that process. trust involves a complex set of tax rules and regulations. A professional who is familiar with the Irules and regulations can provide guidance on how a trust could work with your establishment.

I why people put off creating an estate strategy is because they think it's an intensive or scess, but it doesn't have to be. Remember, just creating the most basic estate documents can ificial for you and your family.

to discuss your estate needs and how we can help you get started.

Subject

You may be able to take advantage of the doubled federal tax exemption with your estate strategy

Body

There's a ticking clock that you should take advantage of. It was part of the 2017 Tax Cuts and Jobs Act (TCJA), and right now, it may be one of the most important levers you can pull.

The TCJA doubled the lifetime estate, gift, and generation-skipping transfer tax. In 2024, the exemption amount is \$13.61 million for individuals and \$27.22 million for married couples at the federal level. Unless Congress changes this law, the exemption will revert back to its 2017 level, adjusted for inflation. The TCJA exemption amounts can be captured only through use for taxable gifts (or transfers at death) before December 31, 2025.

According to Forbes, as we're in the advent of the Great Wealth Transfer — with more than \$84 trillion expected to pass to younger generations in the coming decades — the clock is ticking to develop a strategy that can incorporate the TCJA's features.



Future Enhancements



















Want to learn more?

Book a time to talk with us →

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

Questions? Marketing@fmgsuite.com

We're here to help.

