



# Go for Marketing Gold:



Your Roadmap to Wow'ing Clients!



Wednesday  
11 AM PT / 2 PM ET

## SPEAKERS:

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**Susan Theder**

Chief Marketing and Experience Officer  
FMG



**Samantha Russell**

Chief Evangelist  
FMG



**Patti Brennan CFP®**

CFS and CEO  
Key Financial, Inc



# Summer Marketing Games

Unleash your marketing skills and unlock exclusive perks! Answer one quick question in each game for a chance to win big!

Live Game



Play Now

Opens 7/31



Opens 8/2



Opens 8/5



Opens 8/7



Whether you're looking for a coach to guide the way or a teammate to back your plays, go for the gold all year long with FMG in your corner.

[Learn More](#)



# Financial advisor marketing doesn't get any easier

Build your brand, stay in touch with clients and grow your business – all from one tool.

Our expertise is showing off yours.

[Show Me How](#)[Watch The Video](#)

**Mo Rowe**



First Financial Group

I've had clients reach out with questions



**Tamara Schnieder**



Dixon Financial Group

FMG's support team focuses on



**Julie Johnson**



XY Communication

The entire FMG team has made my life



**David Evans**



Cetera Advisor Networks

The content is professional, the

# An award-winning marketing suite.

## Built just for you.

2024



**#1 in Digital Marketing**

T3 Advisor Software Survey 2024



**Practice Management Solutions Provider of the Year**

Wealth Solutions Report 2024



**Top in Customer Satisfaction**

T3 Advisor Software Survey 2024



2024

2022 & 2023



**Best Marketing Automation**

WealthManagement Industry Awards 2022



**Social Media**

WealthManagement Industry Awards 2022-2023



**Executive Leadership Award For Fintech Platforms**

ThinkAdvisor Luminaries 2023



**Our expertise is showing off yours.**

fmg





## Samantha Russell

Chief Evangelist, FMG

 @SamanthaTwenty

 /samanthacrussell

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## Susan Theder

**Chief Marketing and Experience Officer, FMG**

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# Patti Brennan

CFS & CEO, Key Financial, INC



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Partner with  
One of the  
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Helping  
People Pursue  
Peace of  
Mind\*

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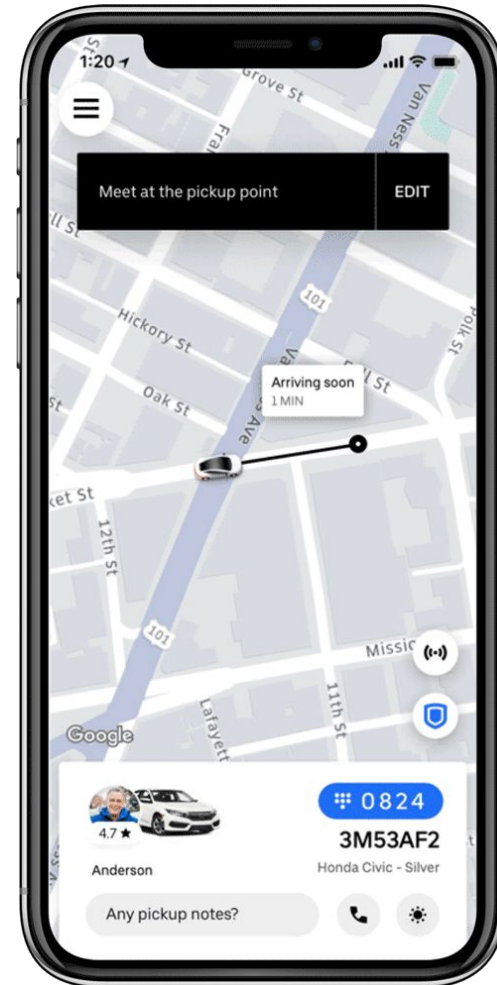
Go For the Gold

#1

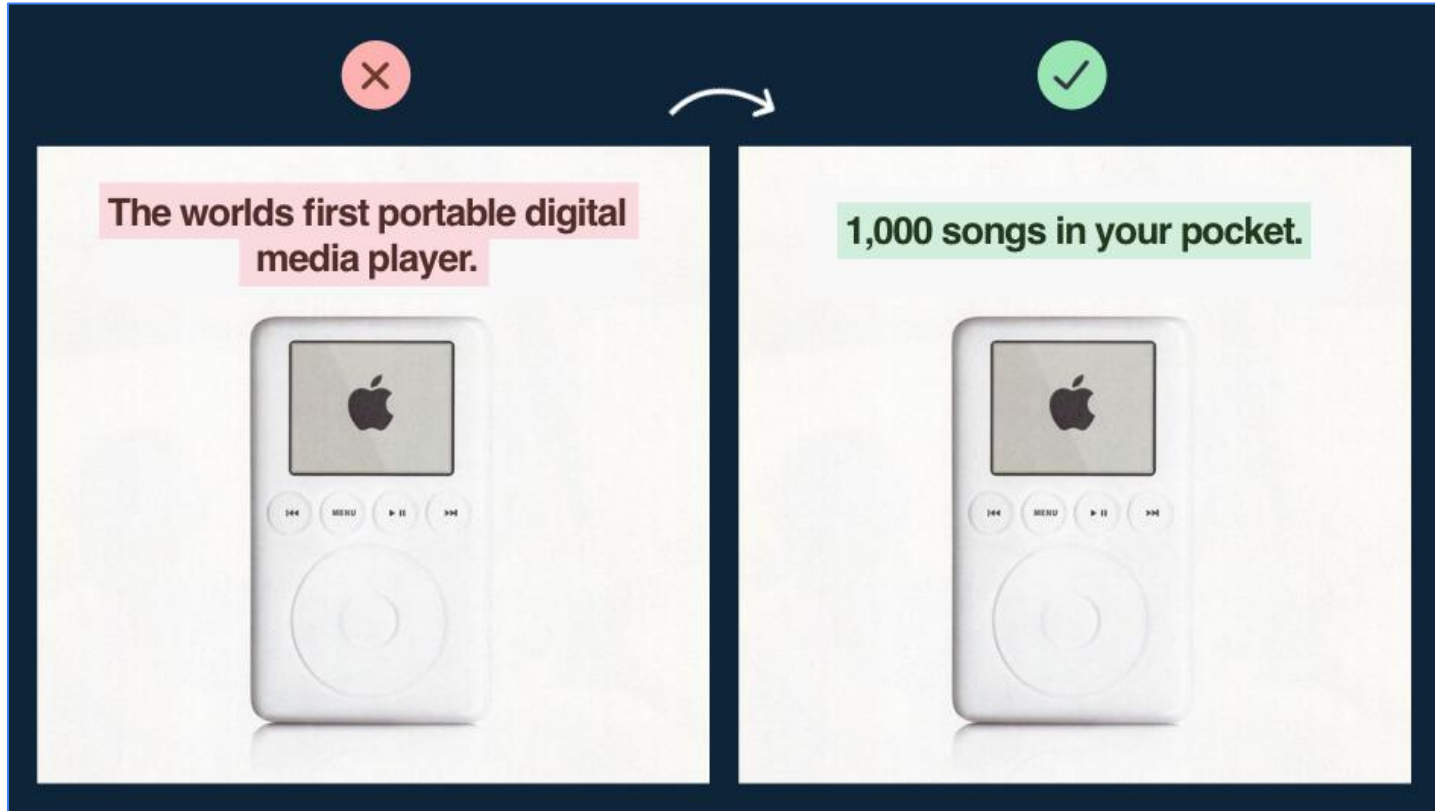
Client Engagement Gold

The Uber map....

How can we rethink  
what we are doing  
to **make the  
experience 10x  
better.**



# It's not about you. It's about what you can do for THEM



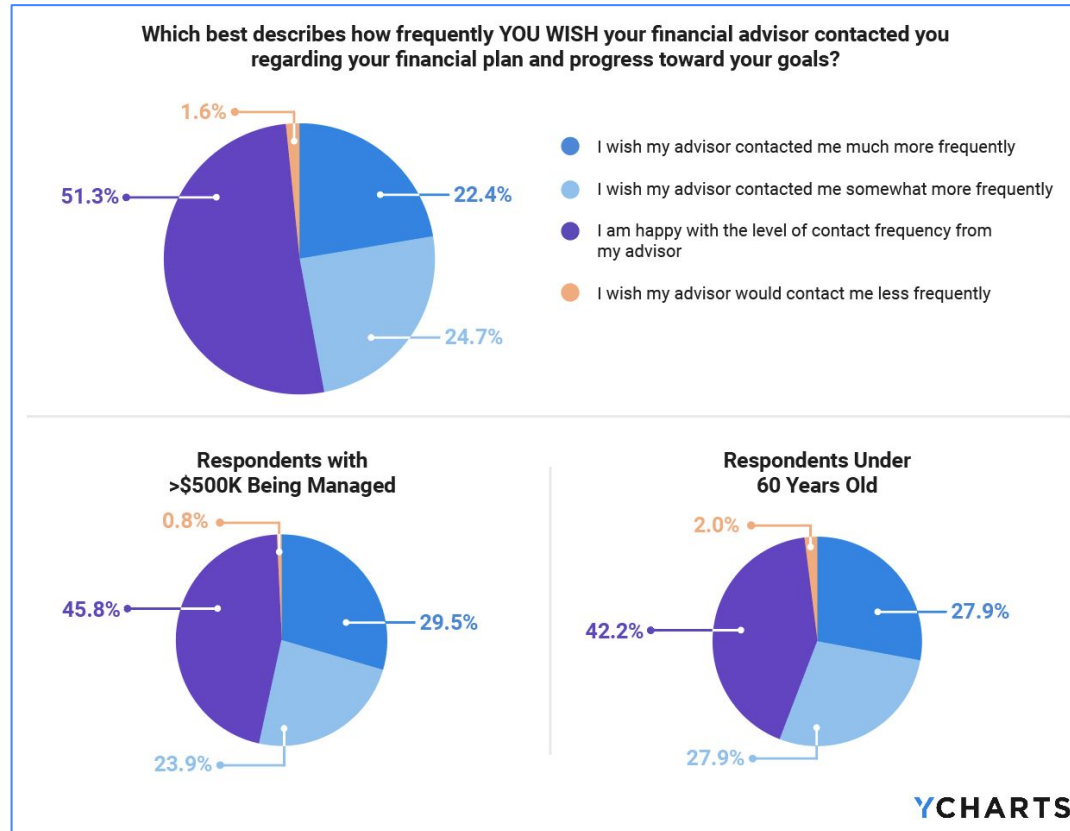
9 out of 10 clients consider their advisors' communication frequency and style when deciding whether to retain their services + make referrals

Yet about **half (47.1%)** of surveyed clients wish their advisor would contact them **more frequently**

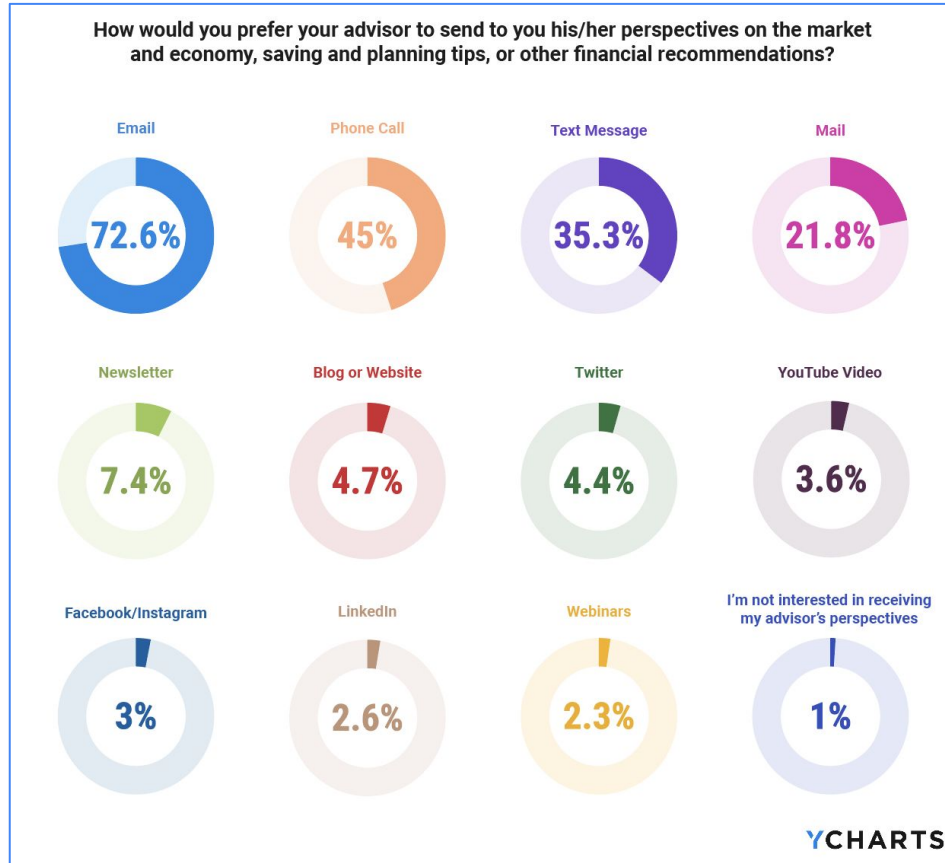
Source: Ycharts Survey



# Client Communication is KEY to Organic Growth



# And Email is the form most clients want....



Analysis from [@Fidelity](#) found that households in which the next generation is engaged generate

160% of the 🏠 revenues and 270% of the 💰 profits of households without family engagement

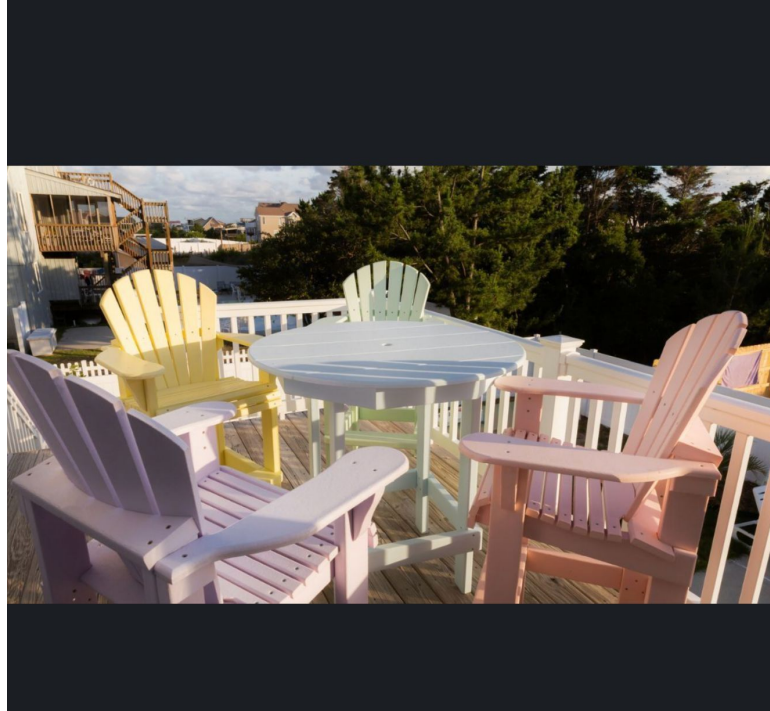
### Older Clients Contribute to Greater Assets at Risk

Average Percent of Firm Assets at Risk by 2045



Cerulli found that HNW **choose** a primary provider based on **services and experiences.**

**Family Education & Counseling** is one of the leading services they are looking for.



When families get together during the summer months, it's a wonderful chance to spend quality time reconnecting and discussing important matters, including your financial future.

One valuable tool we suggest to our clients is the "family meeting."

What is a family meeting?

- Clients invite family members to join us for a high-level overview of their financial strategy.
- As financial professionals, we can help answer questions about investment approaches, key goals, estate decisions, and more.
- We can provide information so that everyone knows where important documents are kept and that we're here to support them.

Sometimes, family members are ready to start a relationship with a financial professional or ask for an evaluation of their existing financial strategy. Others just appreciate knowing that their parents' or grandparents' assets are being taken care of and meeting the professionals with whom they have entrusted the management of their personal finances.



As your family gathers this summer, consider the benefits of bringing everyone together for a financial family meeting.

Go For the Gold

#2

Gold Medal - Worthy Content Ideas

# What kind of questions are HNW prospects looking for answers to?

  **r/RichPeoplePF** · 4 days ago

## Whole For Kids - Part 2

So if anyone recalls i posted about this maybe 2 weeks ago. Lot of replies, a bunch of financial advisors looking to sell me other policies in DMs.

I am not looking for new policies or a new advisor i just want to know do people here have large whole life policies for their kids or does it have no merit?

My retirements are fully funded. Household income ~650k. Every spare dollar goes to brokerage. Which is about \$10-20,000 a month. I'm 35, net worth \$2m.

The whole life in question is \$1m per child at \$500 a month each. Two kids.

Told my advisors i think the money would be better off in the brokerage and they disagree. Obviously the commissions would make anyone biased and it's concerning to me but they also would lose far more to lose me as a client over the long term from poor advisement.

Their reply to my last discussion with them is as follows it's long.

I know there is nothing "positive" online but if you read those articles, they all talk about paying for funeral expenses and policies for \$25K or \$50K death benefit. As I told you, those articles are geared towards 95%-97% of the US that make \$70K a year, and spend it all. They shouldn't have whole life for themselves b/c they can't afford and certainly shouldn't get life insurance for their kids.

...

**r/RichPeoplePF** [Join](#)

**RichPeoplePF**  
This is a community for the people who are too rich for r/personalfinance.

**41K** Members      **36** Online

**In 2023, as clients prepared for wealth transfers and transitions, the fastest-growing HNW services areas were:**

**Estate Planning** → offered by 70% (up from 56% in 2017)

**Tax Planning** → offered by 45% (up from 29%).

## What Prospects Want Help With→

**#1 For the Wealthy!**



## WHAT THE UNADVISED ARE INTERESTED IN RECEIVING HELP ON

- 1 Retirement income planning (27%)
- 2 Social Security/Medicare advice (22%)
- 3 Developing a financial plan (22%)
- 4 Tax guidance (21%)



## Example email to send to **Prospects** regarding taxes

Dear [Prospect],

As we approach the 2023 tax filing deadline, we wanted to reach out to provide you with some information that may be helpful.

Furthermore, the current tax laws are constantly changing, especially with the sunset of the Tax Cuts and Jobs Act at the end of 2025. With all the changes, it can be difficult to ensure that you are taking advantage of all available tax benefits - and planning in advance for likely changes. That's why it's essential to work with a financial and tax professional to help you maximize your deductions and minimize your liability.

**Some key information that may be helpful as you prepare your 2023 taxes include:**

### **The Standard Deduction Increased Slightly**

After an inflation adjustment, the 2023 standard deduction increased to \$13,850 for single filers and married couples filing separately. For married couples filing jointly, the standard deduction rises to \$27,700.

### **Itemized Deduction Rules Largely Unchanged**

- State and local taxes: The deduction for state and local income taxes, property taxes, and real estate taxes is capped at \$10,000.
- Mortgage interest deduction: The mortgage interest deduction is limited to \$750,000 of debt. But people who had \$1,000,000 of home mortgage debt before December 16, 2017, will still be able to deduct the interest on that loan.
- Medical expenses: Only medical expenses that exceed 7.5% of adjusted gross income (AGI) can be deducted in 2023.
- Charitable donations: In 2023, the annual income tax deduction limit for gifts of cash to public charities is 60% of Adjusted Gross Income.

# Include estate planning topics in your emails

Hi {Firstname},

An estate strategy is about much more than just who will get your money or who will get your possessions. It's also about creating an approach for your assets when you can no longer guide the process.

But we also wanted to share with you some common mistakes we've seen and what to keep in mind when you move forward with your strategy:

1. **Consider whether designating assets as Payable on Death (POD) or Transfer on Death (TOD) is good enough.** You may want to explore setting up assets as POD or TOD. While these designations can help, there are more powerful estate documents that may offer more flexibility.
2. **It's not just for after you die:** An estate strategy is also about managing your affairs while you're still alive. For example, a financial and healthcare power of attorney can be established to help manage your affairs if you become incapacitated.
3. **You don't need one when you're young:** Avoiding making an estate strategy because you're young and healthy is a common mistake. At any age, you could find yourself in a medical emergency that requires medical and financial decisions to be made on your behalf.
4. **Avoiding the tough conversations and decisions:** You will have to make tough decisions that you'd probably rather avoid, like deciding who should raise your children. But that's exactly why you should create one, so you can have those conversations with your family now while you still can. As hard as it is to think about your death, it's better to have a strategy to help guide your loved ones.

# Create an “Estate Planning Resource Center” on Your Site

## 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.

## Understanding Your Estate: Critical Elements of an Estate Strategy

Establishing an estate strategy is crucial, yet many wait too long to put their wishes in writing. Use this helpful guide to review your estate strategy and start conversations with your loved ones, financial professionals, and legal team.

First Name

Last Name

Email

GET MY FREE GUIDE



[fmg.com/resource-center/estate/yours-mine-and-ours-estate-strategies-for-second-marriages](https://fmg.com/resource-center/estate/yours-mine-and-ours-estate-strategies-for-second-marriages)



# Estate Planning Email Ideas from FMG

estate Search Filters

All (145) Web Content (60) **Emails (34)** Social Posts (35) Greeting Cards (0) Downloadables (16)

On	☆	Title	Type	Author	Actions
<input type="checkbox"/>	☆	<b>New</b> COI Email Campaign: Estate Attorneys	Email	Do It For Me	<a href="#">Details</a> <a href="#">Use</a> <a href="#">Start Blog</a>
<input type="checkbox"/>	☆	<b>New</b> COI Email Campaign: Tax Attorneys	Email	Do It For Me	<a href="#">Details</a> <a href="#">Use</a> <a href="#">Start Blog</a>
<input type="checkbox"/>	☆	<a href="#">Letter To Beneficiary of Deceased Client</a>	Email	FMG	<a href="#">Details</a> <a href="#">Use</a> <a href="#">Start Blog</a>
<input type="checkbox"/>	☆	<a href="#">4 Important Financial Protection Strategies – Client ...</a>	Email	Do It For Me	<a href="#">Details</a> <a href="#">Use</a> <a href="#">Start Blog</a>
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<input type="checkbox"/>	☆	<a href="#">A Plan for All Seasons (Jan-Dec)</a>	Email Sequence	FMG	<a href="#">Details</a> <a href="#">Use</a>
<input type="checkbox"/>	☆	<a href="#">Age My Way in May</a>	Email	FMG	<a href="#">Details</a> <a href="#">Use</a> <a href="#">Start Blog</a>
<input type="checkbox"/>	☆	<a href="#">Are You Prepared for an Estate Tax Sunset?</a>	Email	FMG	<a href="#">Details</a> <a href="#">Use</a> <a href="#">Start Blog</a>



Be a voice that helps cut through the noise and provides REAL value.



**Douglas Howes** · 2nd  
Personal CFO | Helping People Achieve Their Dreams | Wealth Co...  
1mo · Edited · 🌐

Follow ...

Anyone have a daughter or son who is starting a summer job?

💡 Idea – Have you opened a Roth IRA for them?

As many know, Roth IRA contributions are made with after-tax dollars, so your child will only pay taxes (and perhaps penalties) once they make withdrawals.

What you may not realize is how flexible they are:

- ✅ Your child can withdraw up to the amount of their total contributions at any time, for any reason, without paying taxes or penalties. However, you may have to pay taxes and penalties on any earnings.
- ✅ They can also withdraw contributions before 59½ and before the account is five years old for the following (keep in mind that you may be able to avoid penalties but not taxes):
  - Funds can be used for qualified higher education expenses. 🎓
  - First-time home purchase (up to a \$10,000 lifetime limit.)
  - If your child becomes disabled. 🏠
  - For certain emergency expenses. 🏠
  - If your child is unemployed, they can use a withdrawal to help pay for health insurance premiums. 🏠
- ✅ Things to know:
  - Your child must have earned income to contribute to a Roth IRA.
  - You can open a Roth IRA for your child and manage it until they reach the age of majority in your state.
  - The maximum contribution for 2024 is \$7,000 or the total of their earned income, whichever is less.

Opening a Roth IRA for your child's summer earnings is a powerful way to teach them about saving, investing, and building long-term wealth. It's never too early to start! ✨

👉 Oh, and don't forget, they may need help filling out their Form W-4









If your child earns less than \$14,600 in 2024, they may want to claim an exemption from withholding on their Form W-4 by writing "Exempt" on line 4(c)

# Be Strategic about COIs

All (2458)		Web Content (439)		Emails (532)		Social Posts (998)		Greeting Cards (265)		Downloadables (224)	
On	☆	Title	Type	Author	Actions						
<input type="checkbox"/>	☆	<span>New</span> <a href="#">COI Email Campaign: Business Brokers</a>	Email	Do It For Me	<a href="#">Details</a>	<a href="#">Use</a>	<a href="#">Start Blog</a>				
<input type="checkbox"/>	☆	<span>New</span> <a href="#">COI Email Campaign: CPAs</a>	Email	Do It For Me	<a href="#">Details</a>	<a href="#">Use</a>	<a href="#">Start Blog</a>				
<input type="checkbox"/>	☆	<span>New</span> <a href="#">COI Email Campaign: Divorce Attorneys</a>	Email	Do It For Me	<a href="#">Details</a>	<a href="#">Use</a>	<a href="#">Start Blog</a>				
<input type="checkbox"/>	☆	<span>New</span> <a href="#">COI Email Campaign: Estate Attorneys</a>	Email	Do It For Me	<a href="#">Details</a>	<a href="#">Use</a>	<a href="#">Start Blog</a>				
<input type="checkbox"/>	☆	<span>New</span> <a href="#">COI Email Campaign: General Practice Atto...</a>	Email	Do It For Me	<a href="#">Details</a>	<a href="#">Use</a>	<a href="#">Start Blog</a>				
<input type="checkbox"/>	☆	<span>New</span> <a href="#">COI Email Campaign: Insurance Agents</a>	Email	Do It For Me	<a href="#">Details</a>	<a href="#">Use</a>	<a href="#">Start Blog</a>				
<input type="checkbox"/>	☆	<span>New</span> <a href="#">COI Email Campaign: Tax Attorneys</a>	Email	Do It For Me	<a href="#">Details</a>	<a href="#">Use</a>	<a href="#">Start Blog</a>				
<input type="checkbox"/>	☆	<span>New</span> <a href="#">COI Email Campaign: Trust Underwriters</a>	Email	Do It For Me	<a href="#">Details</a>	<a href="#">Use</a>	<a href="#">Start Blog</a>				

# Try Video Emails

**Add A New Custom Email Section**  
What type of content do you want to add?

 Text	 Featured Content	 Multi-Content	 Curator Content	 <b>Add Section</b> Upload a featured video.
 Image	 Divider			
 <b>Widgets</b>				



# Upload A Video



Timestamp



Never Mind

Select Thumbnail



Go For the Gold

#3

Winning Ways to Get New Clients

## An Email Success Story

- 5 years of emails
- New business worth \$750K



Chevonne Farler, Wealth Advisor

# Drip Email Marketing

## FIRST:

- Collect prospect emails on your site, via LinkedIn, etc

## THEN:

- Email them over time valuable, educational, **TIMELY** content that is **HELPFUL**
- Gets even more effective if you have a niche



Hi {First Name}

Recently the yield curve inverted for the first time since August 2019 (which means that long-term interest rates have dropped below short-term rates).

Why do we pay attention to this?

Because this inversion suggests that investors believe the near-term economy and markets to be riskier than the long-term.

This recent inversion in the yield curve and inflation soaring above 7% have left some investors wondering whether to adjust their investment strategy. While it can be tempting to worry and want to rush and make changes, the current environment is cause for monitoring, not cause for panic.

Yes, rising interest rates, high inflation, surging oil prices, and geopolitical tensions have all contributed to economic uncertainty. And because financial markets don't like uncertainty, they have been performing accordingly.

U.S. inflation clocked in at 7.9% for the 12 months ended February 2022 — the highest rate since December 1981. Energy prices, already on the rise, jumped when Russia invaded Ukraine. In response, the Federal Reserve started raising interest rates, hoping to slow the economy without triggering

# Timely Pieces for the WIN 🏆

- When news breaks, be the trusted expert clients know will help them make sense of the noise

## FMG DIFM PROGRAM

- We write the emails for you - you decide whether to send, and to who



Do It For Me  
MARKETING

Hello,

With continued coverage after the news of Silicon Valley Bank over the weekend, 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: [What's Going On With The Banks?](#)

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.**

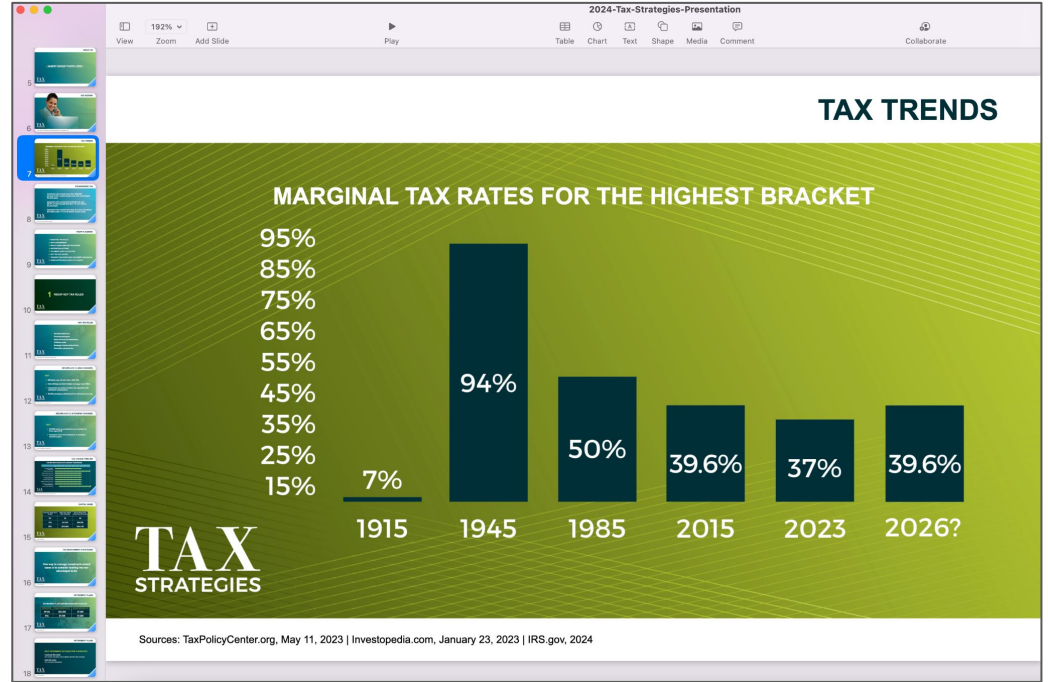
*(Let us know what text changes you would like for the email.)*

**3. Content is not approved.**

*(Nothing will be scheduled.)*

# How do you get more leads to add to your email campaigns?

→ Host educational webinars

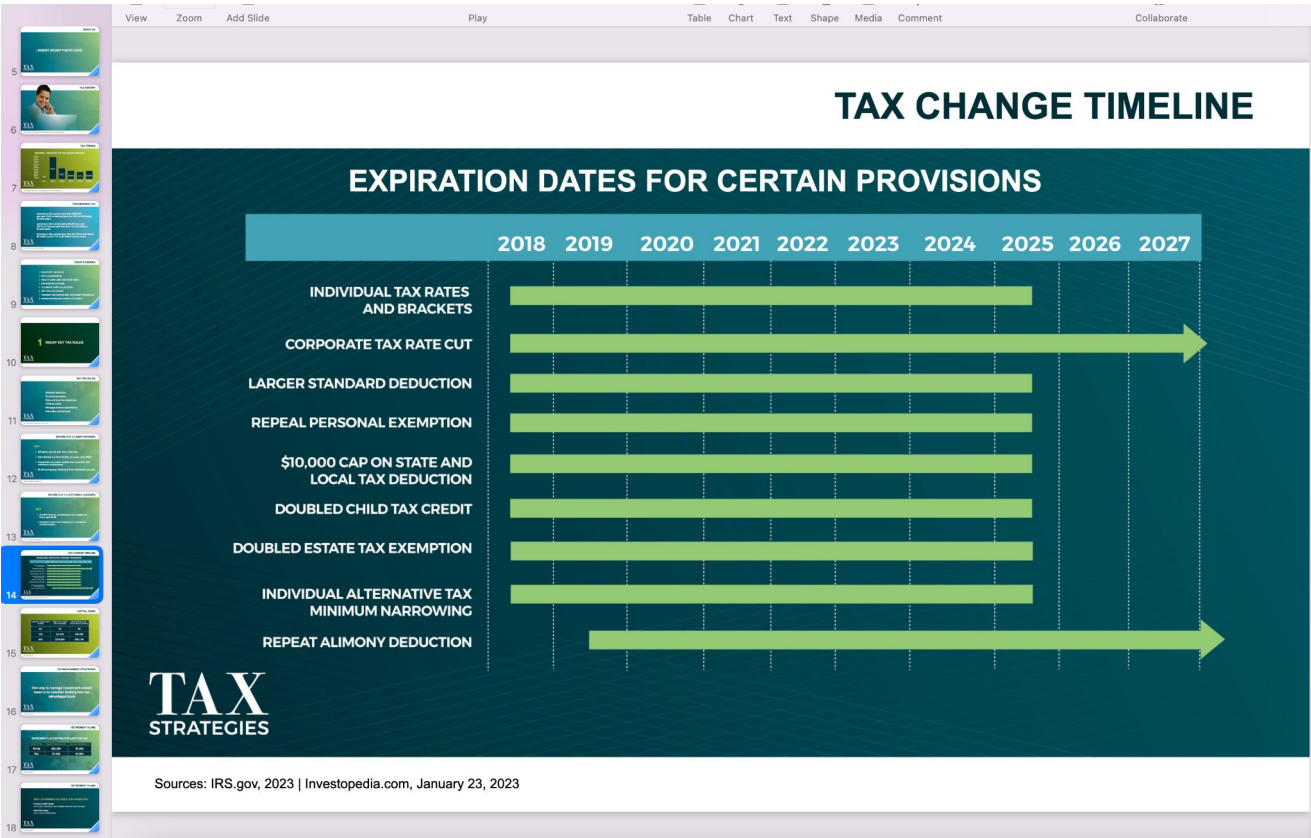


# How do you get more clients to refer friends and family?

## 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.”

# FMG prepares the slides. Just download, edit and present



These visuals also make for GREAT social posts!

Sources: IRS.gov, 2023 | Investopedia.com, January 23, 2023

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



# Social Media: Old Way: Tease Content → Share Link





# Now Zero Click Content

Find both of these examples in the FMG library (general and DIFM)

**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 reactions 2 comments

Like Comment Repost Send

Add a comment...

Most relevant ▾

**Frank Schiller** · 3rd+  
First Director at Public Interests Research and Communicatio...  
2w ·

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!

**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.

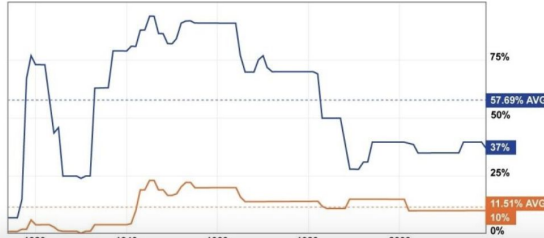
Every person's situation is unique, but as we approach year-end, a Roth IRA conversion for a portion of your retirement portfolio may be a strategy to explore a bit more.

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**

■ US Individual Income Tax: Tax Rates for Regular Tax: Highest Bracket  
■ US Individual Income Tax: Tax Rates for Regular Tax: Lowest Bracket



75%  
57.69% AVG  
50%  
37%  
25%  
11.51% AVG  
10%  
0%

1920 1940 1960 1980 2000

# Get More Followers: Linkedin 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!

The image shows a LinkedIn search interface. The search bar contains 'Crumling, Kirsten'. Below the search bar, three search results are listed:

- kirsten crumling · 2nd · Project Manager at SEI Inves...
- kirsten crumling · 3rd+ · Student at West Chester U...
- kirsten crumling · 3rd+ · --

A 'See all results' link is visible below the search results. In the background, a LinkedIn post by Justin Castelli, CFP® is partially visible, mentioning 'The AGCTM' and '291 followers'.

Overlaid on the bottom right is a Microsoft Teams meeting invitation window. The meeting title is 'FMG/SEI Growth Lab partner planning for August campaign' and it is scheduled for Friday, July 1, from 2:00 to 3:00pm. The meeting location is 'Microsoft Teams Meeting'. There are 5 guests in total, with 1 person (Samantha Russell) having accepted and 4 others (Amy Galli, Crumling, Kirsten, Karissa Hinton, and Susan Theder) still awaiting a response. The name 'Crumling, Kirsten' is highlighted in blue in the guest list.

# The LinkedIn Email Connection Tactic

## Step 1

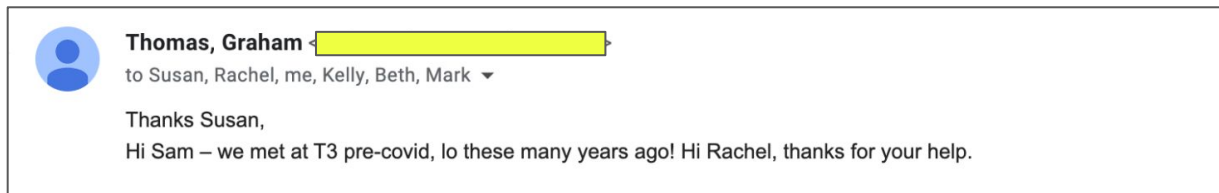
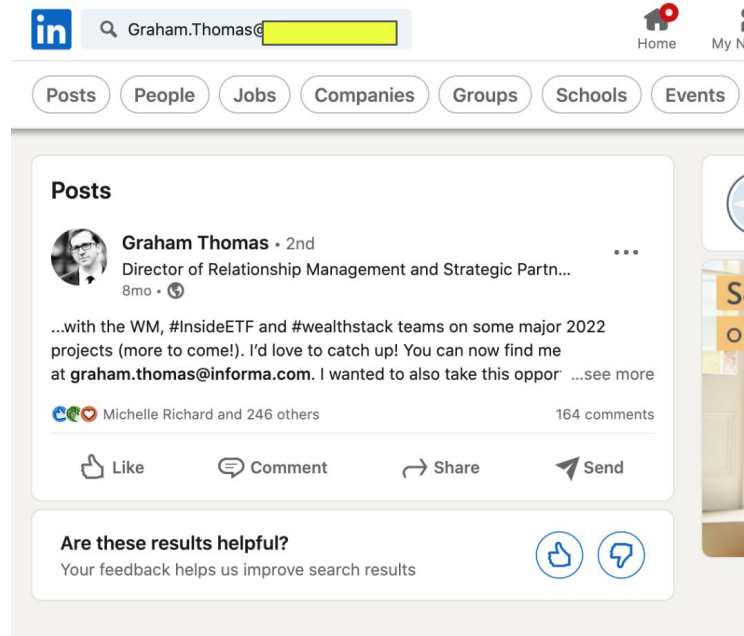
Every Monday and Friday, Go through the last few days of emails and connect with anyone you exchanged messages

## Step 2

Copy the person's email address, search in LinkedIn

## Step 3

Invite them to connect on LinkedIn—that's it!



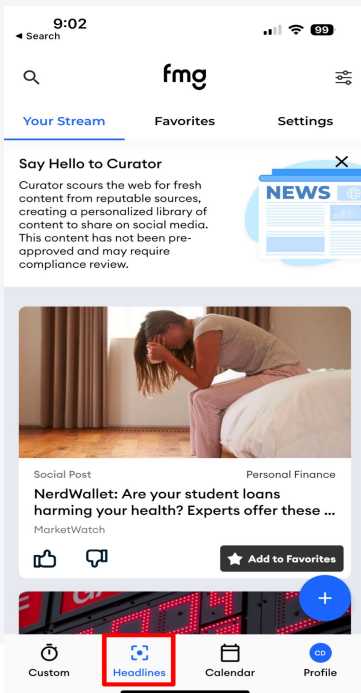
Go For the Gold

#4

Using AI in Marketing

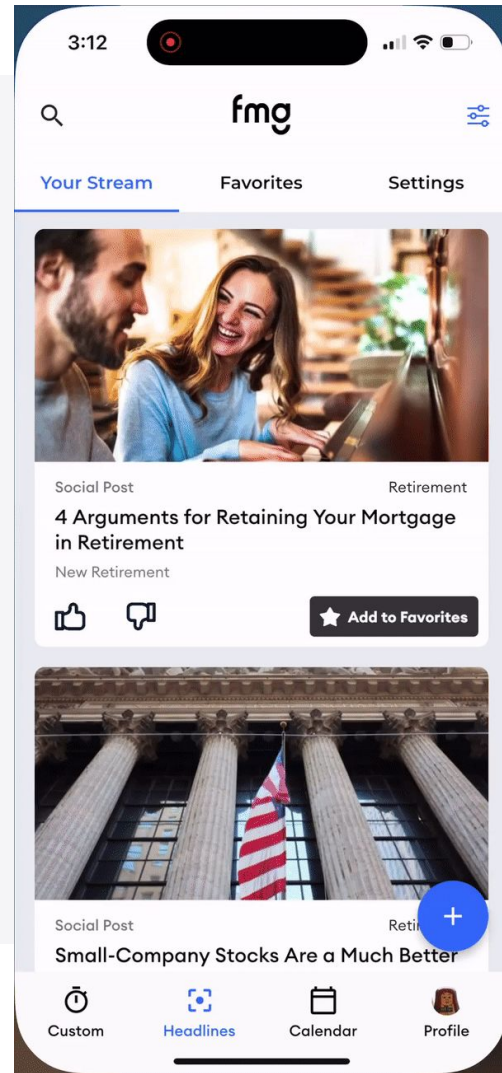
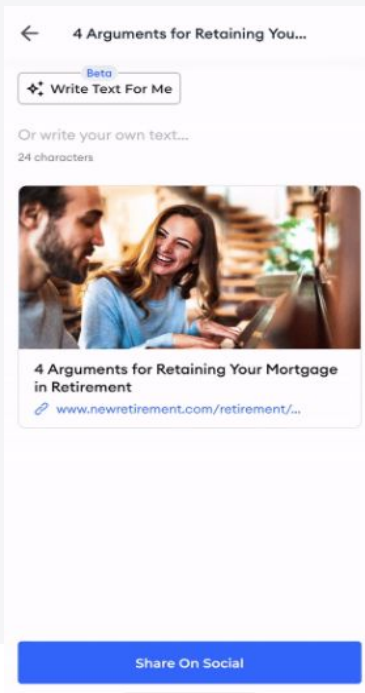
# AI Generated Captions + Mobile App!

## 1. Browse and Choose Your Content

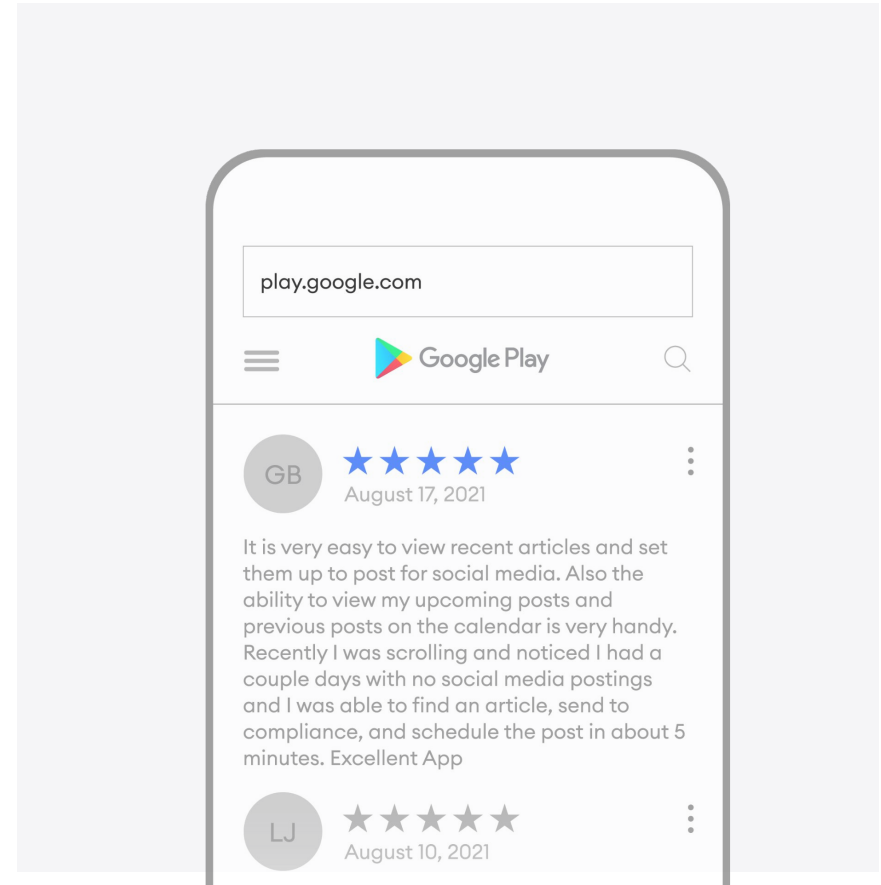


## 2. Add Your Caption

- Write Your Own Text
- Write Text For Me



# Download the FMG App:



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**

## 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	
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	11	12 S: Financial Friday: Social Security Month	13
14	15 <b>Tax Day</b> 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](#)
  - April 2: April is National Financial Literacy Month
  - April 10: National Siblings Day
  - April 15: Tax Day: April 15, 2024
  - April 18: National Healthcare Decisions Day: April 18
  - 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 28: Celebrate Arbor Day: April 28, 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.

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.*

## 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*

Want to learn more?

**Book a time to talk with us** →

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

Questions? [Marketing@fmgsuite.com](mailto:Marketing@fmgsuite.com)

We're here to help.

