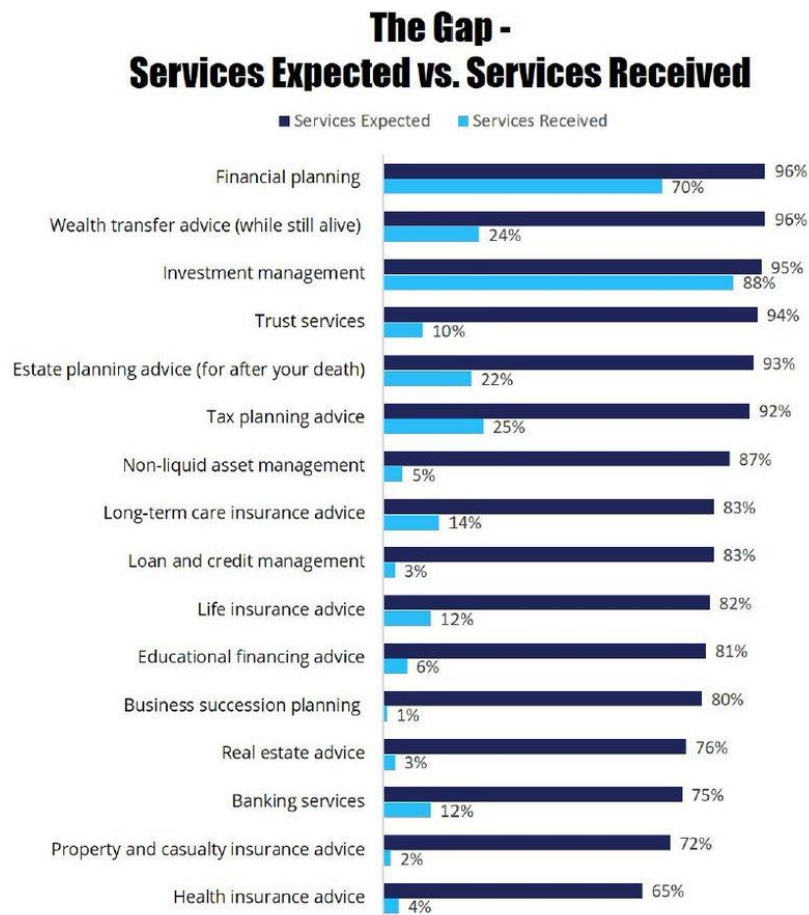


Use these proven strategies to meet client expectations, stay ahead of current events, and establish yourself as a trusted source of information.

1. Focus on the topics that your clients care about

There is a huge gap between client expectations and services rendered, so see how you can fill that gap!



2. Set monthly goals with foundational content planning

- **Blogging:** Aim for 2-3 blogs per month (*Possible topics: Financial planning oriented, Optional: timely topics, human interest, financial topics*)
- **Emails:** 2-4 emails per month (*1 newsletter, 1 timely email, 1-2 planning-related/general interest/blog promotion*)

- **Social Media:** 6-12 posts per month (2-4 financial planning related, 2-4 shared media articles, 2-4 non-financial/tangential)
- **Surprise and Delight WOW's:** 1-2 a quarter for top/ideal clients (random acts of kindness/thoughtfulness, appreciation, birthday/anniversary)

3. Write about what your clients are thinking about

Over **38%** of people say their advisor is their primary source of information, while **35%** of people get their information from their investment account or portal. Talk about what is on your clients' minds before they get the answer elsewhere!

4. Think about timely topics

How will current events affect your clients? Give them peace of mind by staying up to date on timely topics. Share interesting articles from media outlets that your clients might find useful.

5. Leverage AI to help you write captions

Let the suggestions from AI serve as a foundation for your writing, then tweak it to make it your own.

6. Sprinkle in human interest

Write one piece of content and repurpose it in three different ways.

- Write a blog
- Utilize email marketing (Email has an incredible ROI of \$36 for every \$1 spent)
 - When it comes to communicating your services, there are multiple ways to do this, but email is still the most preferred with **72.6%** of surveyed participants preferring email communication.
- Share social posts across your platforms

7. When you're on social media, ensure you're being social

Make sure you're engaging with your audience when you're on social media...don't "post and ghost." While you want to share informational pieces, you can also share personal posts, such as **good deeds**, **motivational posts** and **recognition**.

8. Use imagery in your content

Use charts, images and infographics in your posts. Using imagery is **3X more engaging** than other content.

- Use visuals to communicate complex financial topics
- Charts portray sophistication and expertise

9. Create a content strategy that works

- Set monthly goals to ensure consistency
- Find timely topics to use across blogs, social and emails-**repurpose your content!**
- Let AI help you write your content
- Use charts and graphs to convey complex information and expertise

Ready to enhance your communication strategy?

Explore FMG's "Do It For Me" marketing program and other tools at www.fmgsuite.com.