



Video 101

Proven Step-By-Step Playbook



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#1

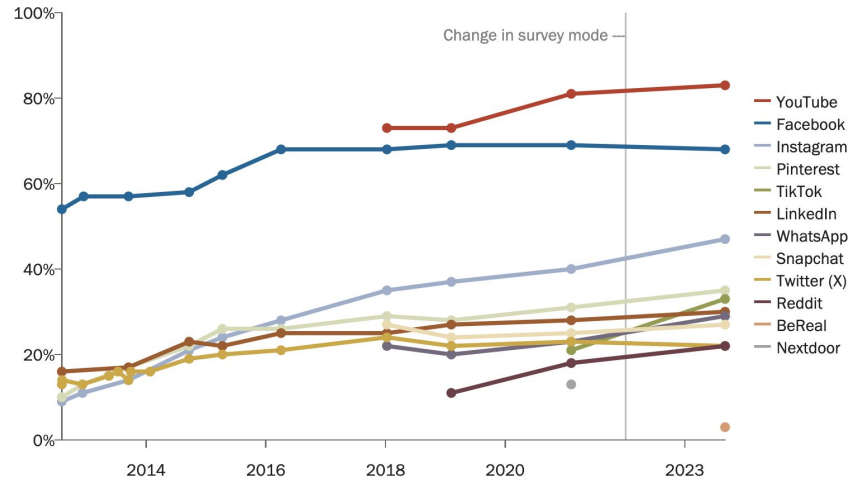
Why Is Video So Crucial for Businesses?

We All ❤️ Video

YouTube and Facebook are the most-widely used online platforms. About half of U.S. adults say they use Instagram, and smaller shares use sites or apps such as TikTok, LinkedIn, Twitter (X) and BeReal.

Which social media platforms are most popular

% of U.S. adults who say they ever use ...



Note: The vertical line indicates a change in mode. Polls from 2012-2021 were conducted via phone. In 2023, the poll was conducted via web and mail. For more details on this shift, please [read our Q&A](#). Refer to the topline for more information on how question wording varied over the years. Pre-2018 data is not available for YouTube, Snapchat or WhatsApp; pre-2019 data is not available for Reddit; pre-2021 data is not available for TikTok; pre-2023 data is not available for BeReal. Respondents who did not give an answer are not shown.

Source: Surveys of U.S. adults conducted 2012-2023.

PEW RESEARCH CENTER

Video = More Conversions, Faster

79% of consumers would **rather watch a video about a product than read about it** (Animoto)

Including videos on a **website can increase time spent on page by 88%** (Forbes)



David Vogel (He/Him) · 2nd

3d ...

Video strategist that helps businesses use visual storytelling ...

Absolutely. Video is a game changer. I have seen client video testimonials completely change a prospects mind and get them to move forward. And an advisor profile video is fantastic at building trust and giving a potential client the opportunity to meet them before meeting them in person.



David B. Armstrong, CFA · 1st

5d ...

~ President - Monument Wealth Management ~ Host of "Mo...

Samantha Russell - we have really embraced video here at **Monument Wealth Management** and we have received a ton of great feedback from clients, advocates and people in our network. It's really shortened the "time to yes" when we meet new clients too.

Video Results in Search



can capital gains push me into a higher tax bracket



Videos



Can Capital Gains Push Me Into a Higher Tax Bracket?

YouTube · James Conole, CFP®
Oct 15, 2022

6 key moments in this video



From 00:00
Introduction



From 01:50
Capital Gains Tax



From 03:15
Capital Gains
Taxes Explained



From 05:25
Ordinary Income v.
Capital Gains



From 07:31
Tax Planning
Strategies



NEW! - Can Capital Gains Push Me Into a Higher Tax Bracket?

YouTube · Ted Erhart, CFP®
Mar 6, 2024

3 key moments in this video



Will Capital Gains Push You Into a Higher Tax Bracket?

YouTube · Tim Doehrmann, CFP®
Oct 3, 2023



Can long term capital gains push me into a higher tax bracket?

YouTube · Travis Gatzemeier
Mar 27, 2024

Feedback

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Video = Prospects See Your Face. Here Your Voice



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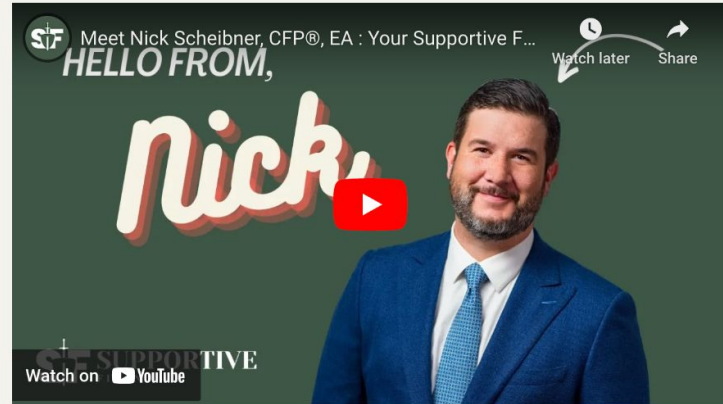
CLIENT PORTAL

A Decade of Experience

In times of uncertainty, remember you are not alone. While it's natural to feel overwhelmed, there can be hope and confidence when we work together to get organized and create a plan.

NICHOLAS J. SCHEIBNER, CFP®, EA

>



Mere Exposure Effect



Stacy Havener · 1st

Grow your investment boutique Founder / CEO @ Havener \$30B A...

[Book an appointment](#)

4d ·

Tell me you work in investments without telling me you work in investments.

Even your beach walk and talks are a risk / reward trade off. 😊 ...more



Anna Robinson and 116 others

49 comments · 1 repost



Stacy Havener · 1st

Grow your investment boutique Founder / CEO @ Havener \$30B A...

[Book an appointment](#)

1mo ·

This mindset shift transformed my biz (and raised \$billions). ...more



Jackie Wilke and 101 others

38 comments · 1 repost



Like

Comment

Share

Save

#2

So Why Aren't More Advisors Creating Video?

The Challenge: I don't even know where to start



Michael (Mike) Coffman · 2nd

4d ...

Certified Financial Planner® at Coffman Wealth Management

I have the ideas just don't know the process!

Like | Reply



Tim Rine, AIF®, CRPC® · 2nd

4d ...

LPL Financial Advisor

Thanks Samantha. I have been sending content for several years, but rarely do I post a video. I would like generate more video content, when appropriate, and leverage tools that would make videos more impactful. Thanks.

The Challenge: I'm Camera Shy & Freeze Up



The Solution: A Step-by-Step System



**Overcome Camera
Shyness**



**Identify Top 3 Video
Formats**



**Create Effective
Videos**

#3

The Top 3 Videos Advisors Should Create

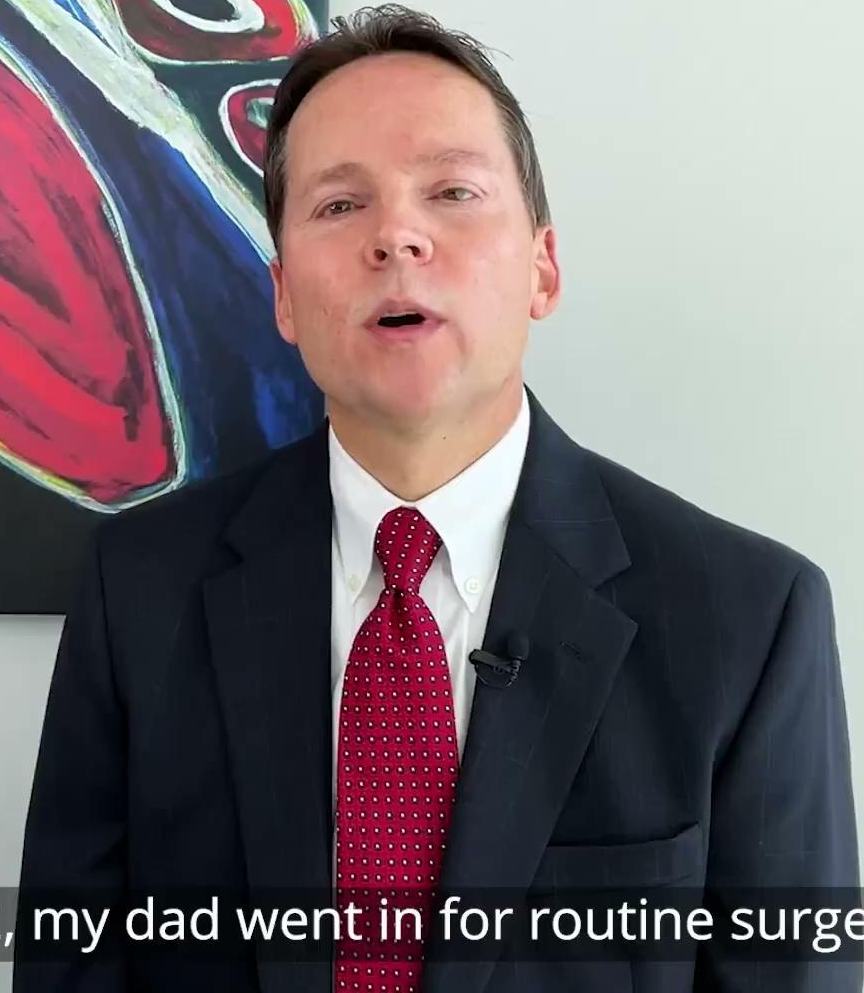
Top 3 Videos Advisors Should Create



Watch these videos on the [Budd Wealth Management website](#).

Tell Your Story: Joe's Founder's Video





When I was 12, my dad went in for routine surgery

Explain Your CX: Budd Wealth Process





Imagine putting together a jigsaw puzzle

Give a Nudge: Re-engagement Message





Life gets hectic,

#4

You've Recorded the video – Now What?

Edit - Sam recommends [Veed.io](#)

- Add subtitles
- Put Text over video
- Cut sections
- Splice together
- Bring in images
- and more!

The screenshot displays the Veed.io video editor interface. On the left is a sidebar with navigation icons for Settings, Media, Audio, Subtitles, Text, Elements, Record, Transitions, and Filters. The main workspace is divided into a 'Subtitles' panel on the left and a video preview window on the right. The 'Subtitles' panel shows a list of subtitle entries with their start and end times. The video preview window shows a woman speaking with large white text overlaid: 'Zero Click Content' and 'WHAT YOU NEED TO KNOW'. A subtitle bar at the bottom of the video reads: 'How many times do you Google something and you get...'. The bottom of the interface features a timeline with a playhead at 00:05:2 and a keyboard shortcuts bar.

Subtitles	Translate	Styles	Options
How many times do you Google something and you get			In: 00:04.4 Out: 00:07.7
the answer to your question without even needing to click			In: 00:07.7 Out: 00:11.1 CPL -2
any website or blog to get the answer?			In: 00:11.2 Out: 00:13.6
Google just gives you the answer			In: 00:13.7 Out: 00:15.8
right there in the SERP.			In: 00:15.9 Out: 00:17.2
The search engine results page page .			In: 00:17.3 Out: 00:19.2
You might not realize, but more than two thirds			In: 00:19.3 Out: 00:22.1
of all Google searches now end without a click.			In: 00:22.2 Out: 00:26.4

✔ Video done. Time to promote!

👉 Add it to your FMG website (include the transcript for SEO if its a blog format)

👉 Promote it via Email

👉 Upload to Youtube

👉 Make clips and share on social media

Optimized Video Title

Your video's title should be a few short words – a maximum of 60 characters. Similar to the file name, titles should be descriptive and summarize the video in a captivating way. Again, be sure to include the keywords you're hoping to rank for.

The screenshot shows the YouTube video editor interface for a video titled "Top Ideas to Stand Out and Attract the Next-Gen". The title is highlighted with a red box. The description is as follows:

Description

The Great Wealth Transfer is here, and the new generation of HNW decision-makers defines value differently. Whether you're connecting with next-gen clients, clients' next gens or prospects, experiences are more important than ever to attracting and retaining them.

In this webinar, Chief Marketing & Experience Officer, Susan Theder and Vice President & Advisor Consultant at First Trust, Jackie Wilke shared 10+ simple ways you can leverage experiences to create raving fans and drive growth, future-proofing your business.

They discussed:

- 0:00 Intro
- 3:32 Remember that experiences are everything
- 5:29 Modernize your value by serving people
- 13:04 Your clients' next-generation
- 17:50 Highlighting your human capital
- 24:16 Ramp up your virtual and digital channels
- 29:19 Weave in meaningful moments and life events
- 33:48 Learn how to educate your audience
- 38:12 Tips for hosting your events
- 41:25 Share a hook or resource

At the bottom, there are links for resources and the channel:

- ▶ Get the resources and key points here: <https://ow.ly/Pkj50PPYbv>
- ▶ Subscribe to our Channel: <https://ow.ly/LB3m500M1RN>

The right-hand side of the screenshot shows video settings, including the video link (<https://youtu.be/PZwcyv5caRQ>), filename (9.21.23 Webinar with Susan and Jackie.mp4), video quality (50), visibility (Public), and restrictions (None).

On Website - Introduce to Your Firm

Where to Use this?

→ On the homepage

Source: wealthkeel.com



The screenshot shows the homepage of WealthKeel LLC. At the top, there is a navigation bar with the company logo on the left and menu items: SERVICES, THE WEALTHKEEL DIFFERENCE, WHO WE SERVE, INSIGHTS, FAQs, and CONTACT. A red-bordered button labeled "Schedule Icebreaker Call" is positioned on the right side of the navigation bar. The main content area features a section titled "Our Focus on Physicians" with a decorative grid of dots to its left. Below the title is a paragraph of text: "Our founder decided to work with physicians after a move to Philadelphia surrounded him with young physicians facing some of the most complex and important financial decisions of their lives... and with no one to rely on. WealthKeel chooses to work with Gen X & Gen Y physicians due to the unique complexities that this group faces." To the right of the text is a video player showing a man speaking. The video player includes a "MORE VIDEOS" button, a "ction" button, and a progress bar showing 0:04 / 3:56. The video player also has "Watch later" and "Share" options. Below the video player is another paragraph of text: "We are passionate about serving Gen X & Gen Y physicians. Why? We firmly believe this group of hard-working professionals has been dealt a difficult hand and faces a lot of critical financial decisions."

On “Meet the Team” Pages

Where to Use this?

→ “About Us”

or “Our Story” page

Source: druckerwealth.com



The screenshot shows the top of the Drucker Wealth website. The header includes the logo 'DRUCKER WEALTH' with the tagline 'Financial Planning | Wealth Management' and a navigation menu with links for 'ABOUT US', 'WHO WE SERVE', 'WHAT WE DO', 'RESOURCES', and a 'START HERE!' button. The main content area features a black and white photograph of a man holding a child, with a dog in the foreground. Below this is the heading 'Here's How We Got Started' followed by two paragraphs of text. At the bottom right, there is a color photograph of Lance Drucker, with a caption identifying him as 'LANCE DRUCKER, CHFC®, CLU®, PRESIDENT'.

DRUCKER WEALTH
Financial Planning | Wealth Management

ABOUT US WHO WE SERVE WHAT WE DO RESOURCES **START HERE!**

Here's How We Got Started

To explain who we are, we'll start with where we came from. Our third-generation financial planning firm was founded in 1959 by Bernie Drucker. Today, Bernie's legacy of using comprehensive planning to help families find financial independence is carried on by his son Lance and grandson, Gideon.

Over the past 3 generations and 63 years, we have provided objective financial advice to individuals and families looking to reach their financial potential. As fiduciaries we specialize in working with motivated & successful high earning professionals looking to take control of their financial future. Our whole approach is meant to help these HENRY's (High Earners Not Rich Yet) find their financial footing as, together, we design their interactive & ever evolving [Financial Life Plan®](#).

LANCE DRUCKER, CHFC®, CLU®, PRESIDENT

As a Video “Blog” (Vlog)

Where to Use this?

→ “Insights” or “Blog” page.

→ Be sure to include a transcript for best SEO!

Source: highballadvisors.com

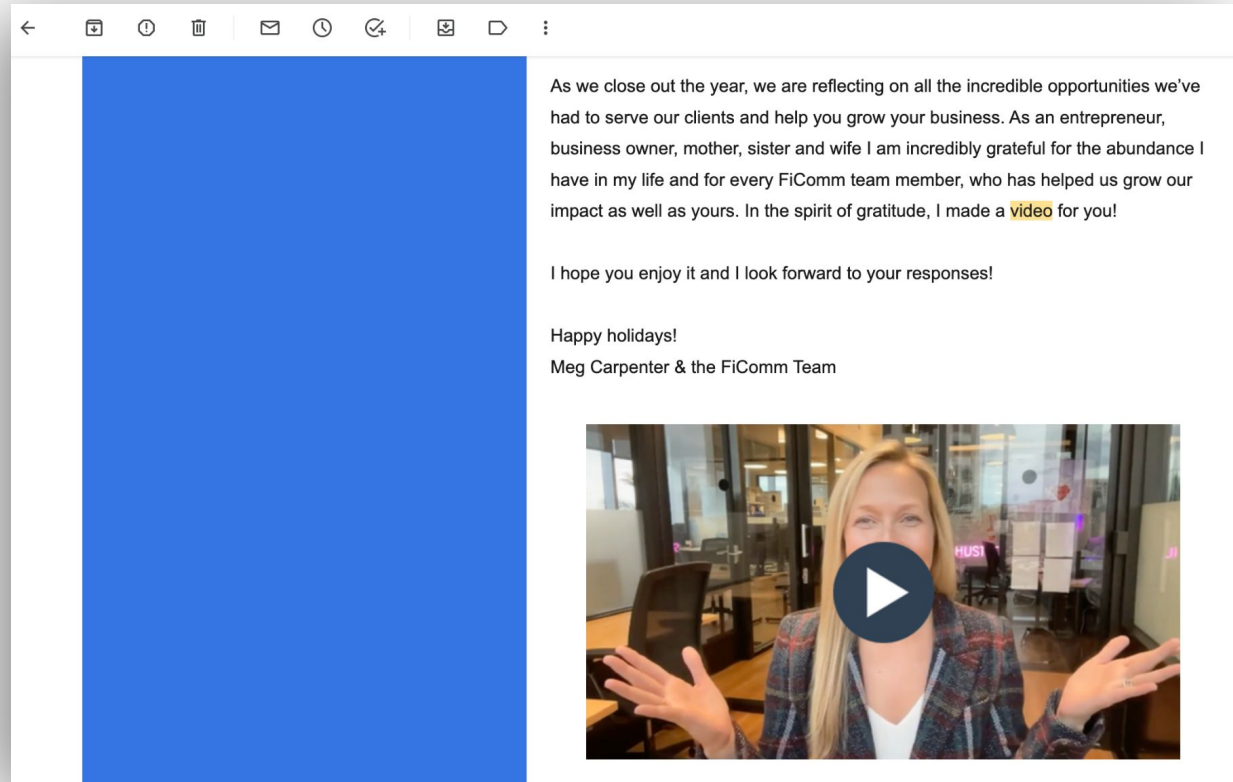


The screenshot shows a webpage from Highball Advisors. At the top left is the Highball Advisors logo, a stylized 'H' inside a diamond shape. To the right of the logo is a navigation menu with links: "Who We Serve", "Our Process", "Solutions", "About", "Learning Depot", "Speaking", "Contact Us", and a "Free Newsletter" button. Below the navigation is the main heading "Should I Tax Loss Harvest in Railroad Retirement?". Underneath the heading is a sub-heading "VIDEO, RETIREMENT, FINANCIAL PLANNING, INVESTING, TAXES". The central focus is a video player. The video thumbnail shows a man in a suit and vest speaking, with a large text overlay that reads "Should I Tax Loss Harvest in Railroad Retirement?". The video player includes a "Watch on YouTube" button at the bottom left. Below the video player is the word "Transcript:".

In Email Campaigns

Where to Use this?









→ *Emails to Clients and Leads*



NEW! With FMG you can now easily upload video to email

Add A New Custom Email Section

What type of content do you want to add?

 Text	 Featured Content	 Multi-Content	 Curator Content	 Video
 Image				
 Widgets	 Divider			

Upload A Video



Timestamp



Never Mind

Select Thumbnail

How FMG & Idea Decanter Make it Easy



Financial planning doesn't have to be *a big deal.*

GET STARTED

CLIENT ACCESS





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 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](#)
 - 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 28: 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.

A **Custom Marketing** plan each month

Executed for you

Exclusive Content by our marketing thought leaders only available for DIFM customers

Your own dedicated **Marketing Strategist**

BRAND NEW!! Adding a VIDEO SCRIPT with LINK to IDEA DECANTER!

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

We're here to help.

