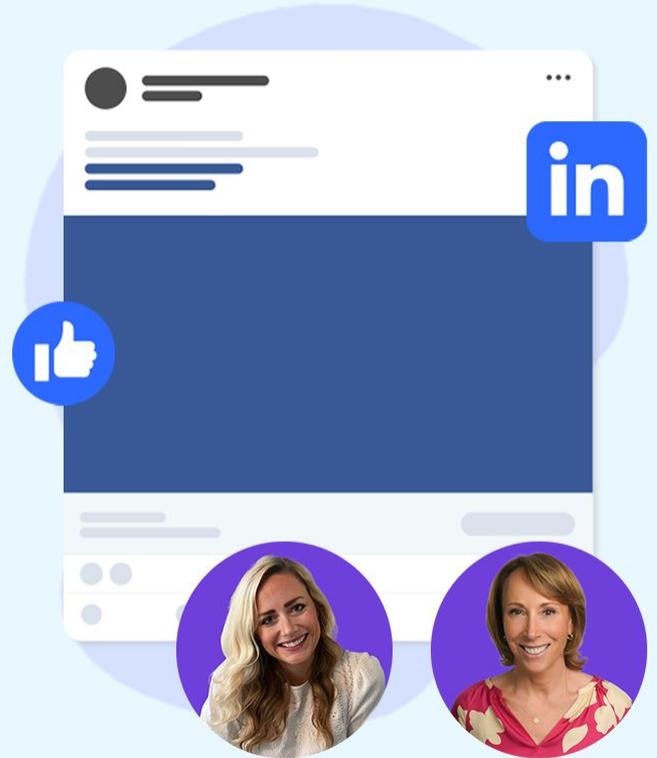




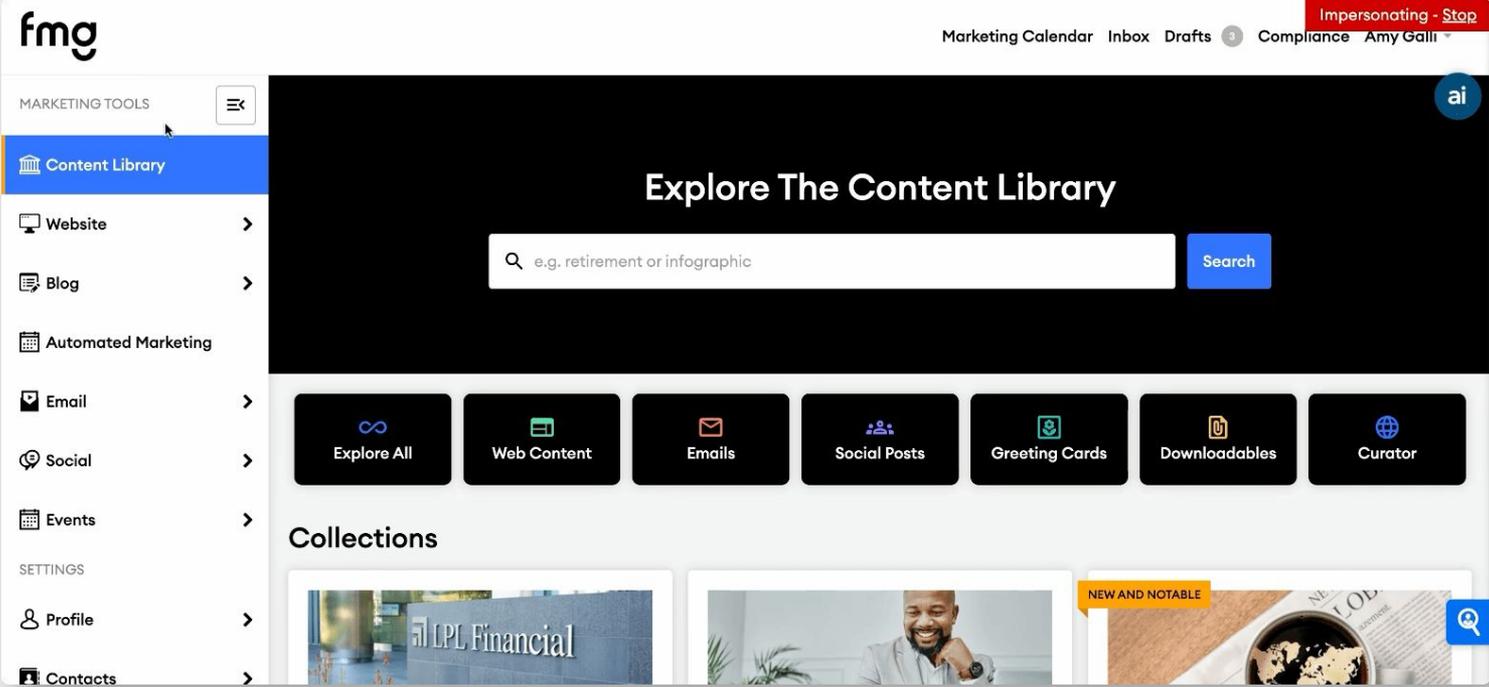
LIVE WORKSHOP:

5 Reasons You're Not Getting Any Results on Social Media

+ How to Fix It



FMG is the only all-in-one compliant marketing solution for financial advisors.



#1 in Digital Marketing
13 Advisor Software Survey (2024)

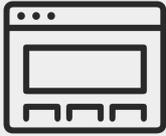


**Practice Management Solutions
Provider of the Year**
Wealth Solutions Report (2024)



Top in Customer Satisfaction
13 Advisor Software Survey (2024)

Marketing Your Business Doesn't Get Any Easier



Beautiful Websites

- Responsive, modern design
- SEO, lead generation & compliance built in
- So easy to use, advisors can update themselves



Automated Campaigns

- From newsletters & commentaries to current events
- Open rates average 33% & often top 47%



Award Winning First Line Support

- For advisors and their staff
- Weekly and monthly training calls

5 Biggest Social Media Mistakes and what to do instead

5 Biggest Social Media Mistakes

#1. You don't know how to hook your audience in the first line. Try one of these....

Intriguing Questions

- * *"What if I told you that."*
- * *"Have you ever noticed...?"*
- * *"Want to know the one thing that changes everything?"*
- * *"Why does no one talk about...?"*
- * *"Are you making this mistake?"*

Curiosity Phrases

- * *"Here's what nobody tells you about..."*
- * *"You won't believe what happened when..."*
- * *"This might shock you..."*
- * *"Ever wondered why...?"*
- * *"Most people don't know this..."*

Problem-Solving Phrases

- * *"Here's how to fix..."*
- * *"Struggling with this? Try this..."*
- * *"The simple way to overcome..."*
- * *"This will change the way you think about..."*
- * *"Finally, a solution for..."*

5 Biggest Social Media Mistakes

#2. You don't follow the 80/20 rule of engagement

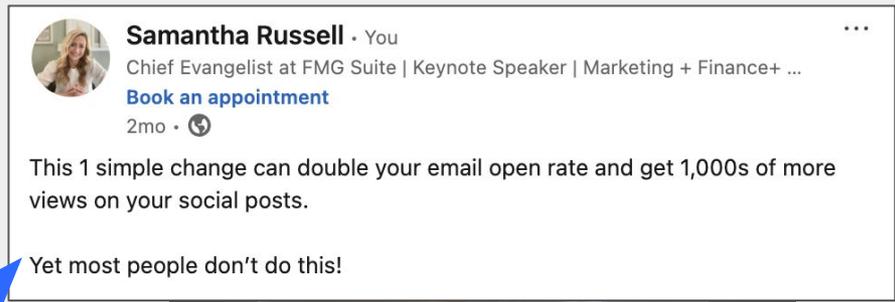
For every **1** thing you post...

You need to leave comments on at **LEAST 5** other people's posts

5 Biggest Social Media Mistakes

#3. You don't use the "what's in it for me mindset" when crafting your posts

Before posting anything - ask yourself: WHY should someone care?



A screenshot of a social media post from Samantha Russell. The post includes her profile picture, name, title, a link to book an appointment, and two lines of text. A blue arrow points from the text below to the second line of text in the post.

Samantha Russell · You
Chief Evangelist at FMG Suite | Keynote Speaker | Marketing + Finance+ ...
[Book an appointment](#)
2mo · 🌐

This 1 simple change can double your email open rate and get 1,000s of more views on your social posts.

Yet most people don't do this!



A video player showing a woman with blonde hair speaking. A white text box with a black border is overlaid on the video. The text in the box reads: "Digital Marketing", "Do this" with a green checkmark, "Not that" with a red X, and "Episode 1". The video player interface at the bottom shows a progress bar at 0:58, 1x playback speed, and other controls.

Digital Marketing
"Do this ✓"
"Not that ✗"
Episode 1

5 Biggest Social Media Mistakes

#4. You never get personal. You don't know how to share stories without feeling cringe-worthy.

 **Emily Casey Rassam CFP®, C...** (She/Her) · 1st
Investopedia Top 100 Advisor 2023 | He...
[Book an appointment](#)
6d · Edited · 

🤔 How do you feel when you look at your credit card balance after a trip?
...see more



✦ Takeaways ✦ How do you soothe yourself after an expensive >

  45 46 comments · 1 repost

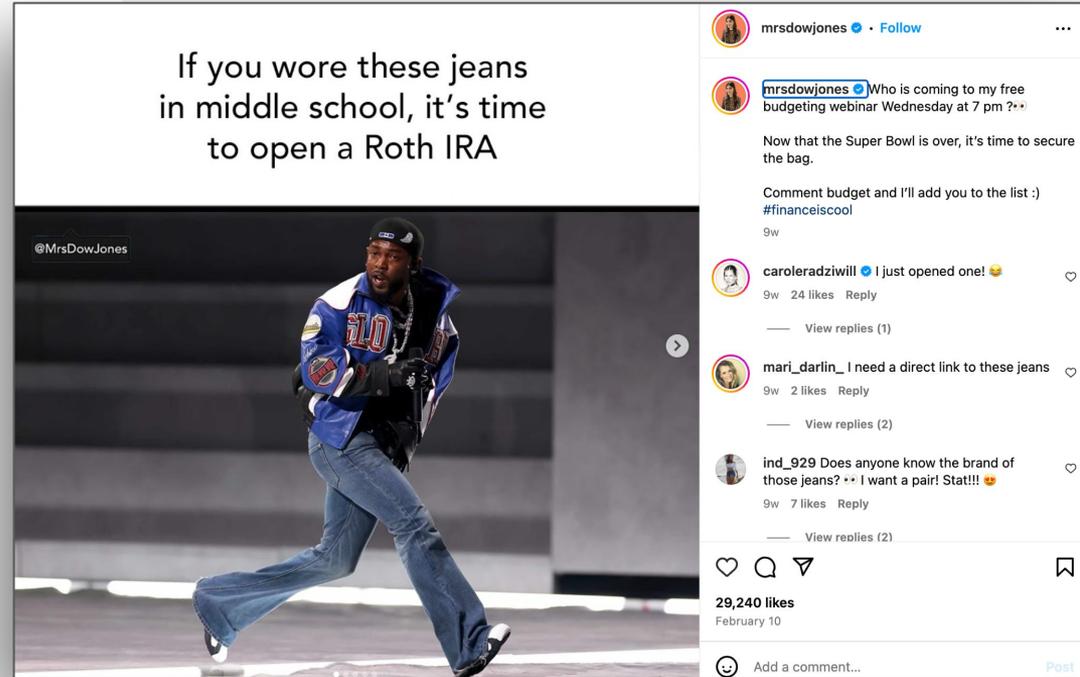
5 Biggest Social Media Mistakes

#5. You don't know which social platform or strategies work best for your target audience

LinkedIn: 18 – 60+ who are still actively working

Instagram: 25 – 55 year olds, especially women and mass affluent

Facebook: 35 – 75 year olds, especially great for targeting your local community



LinkedIn



Playbook for LinkedIn Content

Minimum 3 posts per week:

- 1 that shows off your expertise
 - 1 that starts conversation/gets 👁️
 - 1 that shares personal photo/angle
- ask a question that is EASY for people to answer whenever you can

The mix is important! 🙌

**If you don't engage with others,
it won't matter how good your content is**

Playbook for LinkedIn Engagement

- 5 comments to 1st degree connections
- 5 comments to 2nd/3rd degree connections
- Respond to all comments on own content
- 5 DMs
- 3 connection requests
- 3 follows

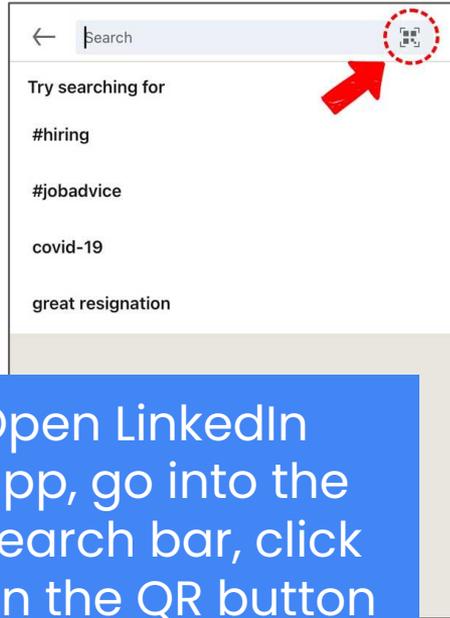
That takes about 15-20 minutes 🙌

← **This is the part you
CANNOT outsource.**

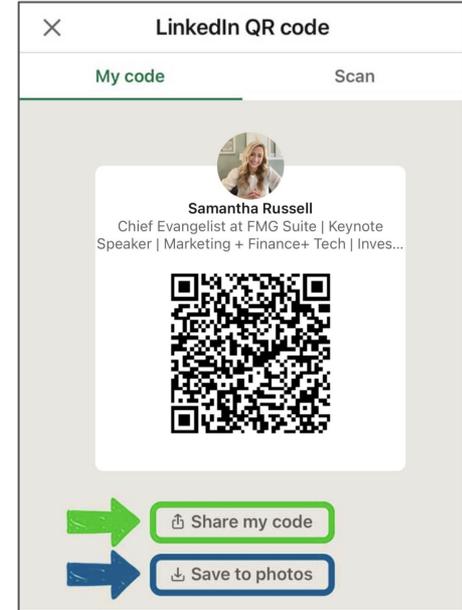
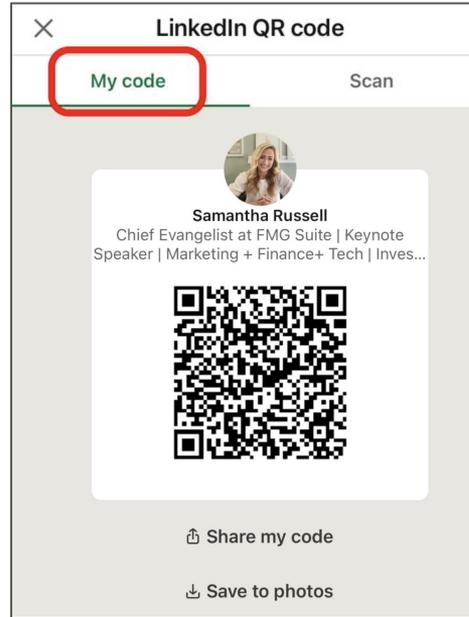
**YOU or YOUR TEAM has to do
this.**

Remember, if you have no
**network, no one will see
your content! It's time to
grow your network!**

Ditch the business cards... use your LinkedIn QR code!



Open LinkedIn app, go into the search bar, click on the QR button on the top right



A simple way to get 1,000s of new connections this year

Step 1

Every Friday, Go through the last 5 days of your calendar and emails

Step 2

Copy the person's name or email, look them up via LinkedIn

Step 3

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

fmg

The image shows a LinkedIn search interface with the search bar containing "Crumling, Kirsten". Below the search bar, three search results are listed, all for "kirsten crumling". The first result is "2nd • Project Manager at SEI Inves...", the second is "3rd+ • Student at West Chester U...", and the third is "3rd+ • --". A "See all results" link is visible below the search results. In the background, a LinkedIn profile for Justin Castelli, CFP® is partially visible, along with a post from The AGCTM. In the foreground, a Microsoft Teams meeting invite is open, titled "FMG/SEI Growth Lab partner planning for August campaign". The invite is for Friday, July 1, from 2:00 to 3:00pm. It lists 5 guests: Samantha Russell (checked in), Amy Galli, Crumling, Kirsten (highlighted), Karissa Hinton, and Susan Theder. The invite also shows 1 yes and 4 awaiting responses.

Instagram



Playbook for Instagram Content

**Minimum 1 post per week
PLUS post to stories 3-6x week**

- 1 post that shows off your expertise
- 1 story that shows your face
- 1 reel or carousel that is very SHAREABLE

- Ask people to “comment X to get Y”

The mix is important! 🙌



6

MYTH

I Should Start Collecting Benefits as Soon as I'm Eligible!

While you can start collecting benefits at age 62, a measured retirement strategy may help guide your decisions on when to begin collecting benefits.

Playbook for Instagram Engagement

- 5 comments on connections posts
- 5 comments on posts of target audience
- Respond to all comments on your own content - ask follow up questions

That takes about 15-20 minutes 🙌



**THE #1
FINANCIAL
FREEDOM
KILLER NO ONE
TALKS ABOUT**

LICENSED FINANCIAL ADVISOR

moneymindsetmami • Follow
New York, New York

moneymindsetmami ... the harsh truth: did it surprise you?

Save this post for later!

Comment "Freedom" below, and I'll send you a free Wealth Checklist to get your money working for YOU, not your car.

#womenadvice #womeninbusiness #wealthmindset #EntrepreneurLife #BusinessTips #hustle #wealthmindset #richmindset #financialfreedom

14w

denesecort Freedom
29m Reply

bosswomen.club This leads to recognition for your efforts! Let's discuss creating something together!
13w Reply

wendyabbo Freedom
3w 1 like Reply

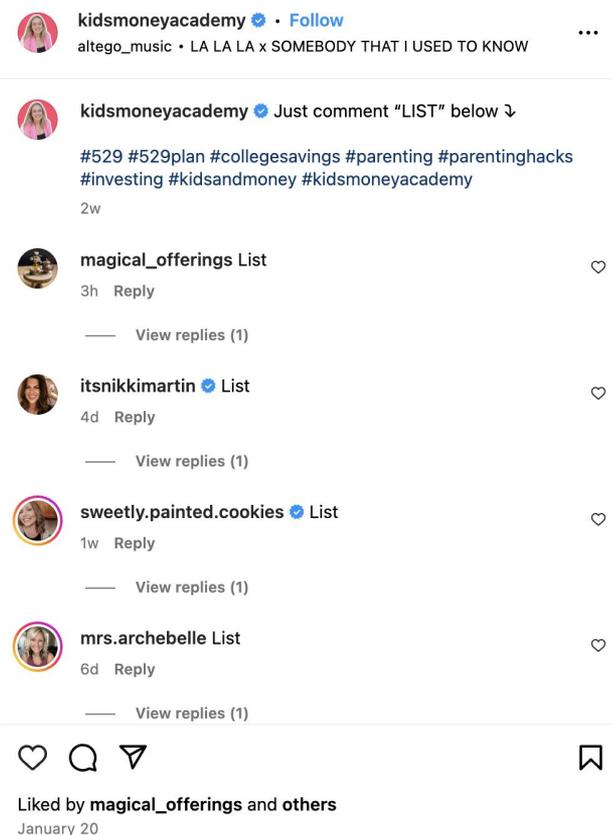
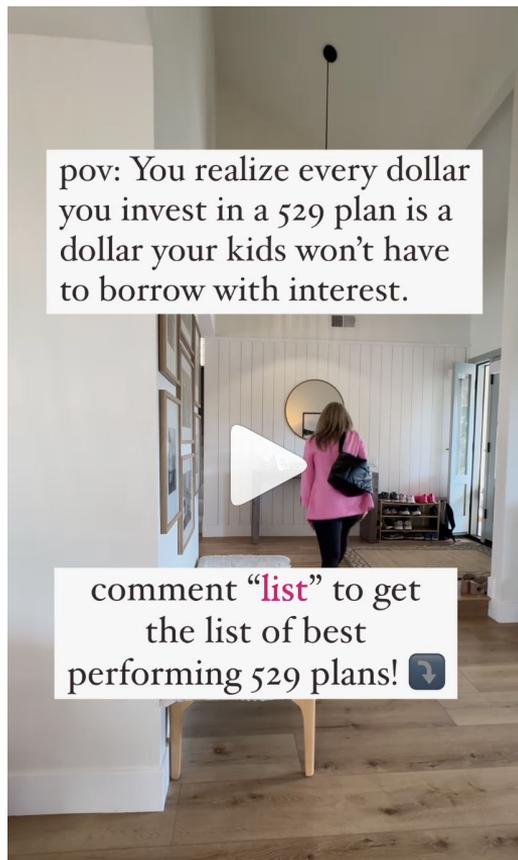
— View replies (1)

Liked by hello...manhattan and others
January 2

Add a comment... Post

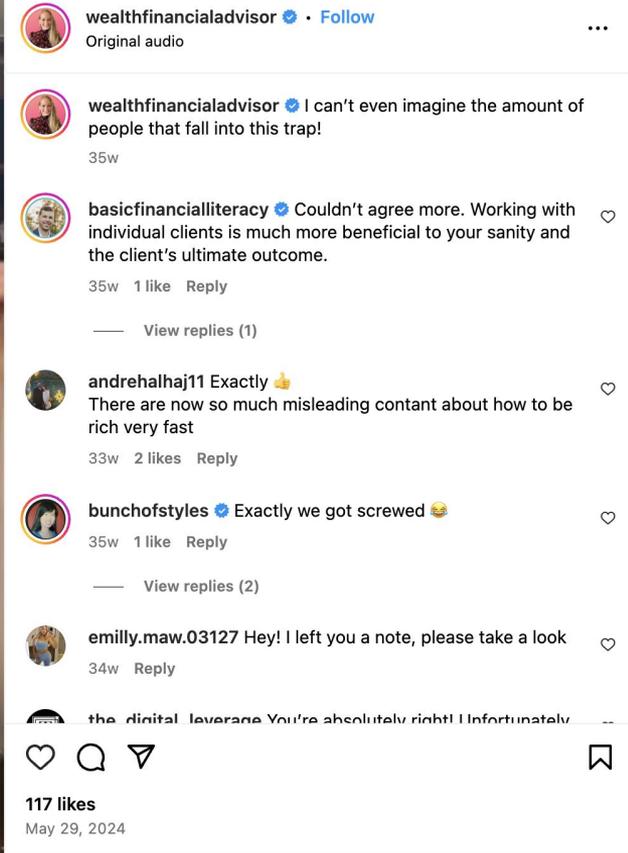
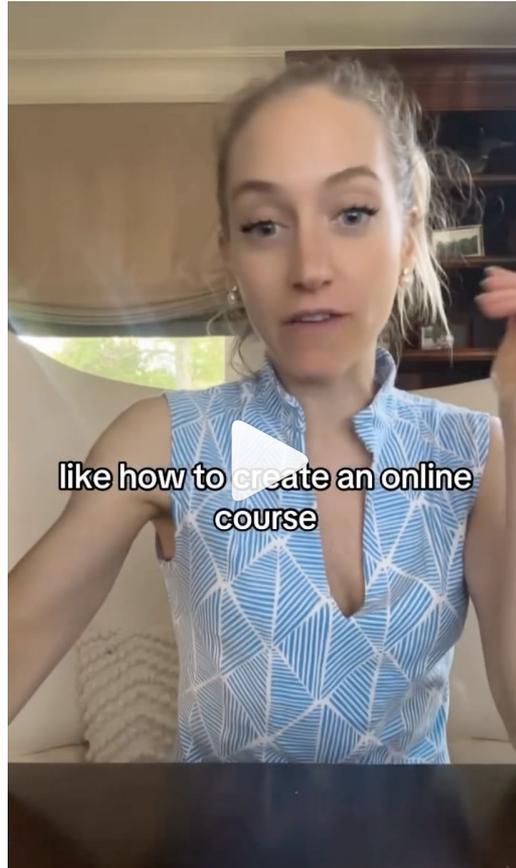
What type of content to share?

- Use **REELS** to grow your audience
- Use **Carousels** to connect with the audience you already have
- Use **STORIES** to engage both



Video: The format instagram LOVES

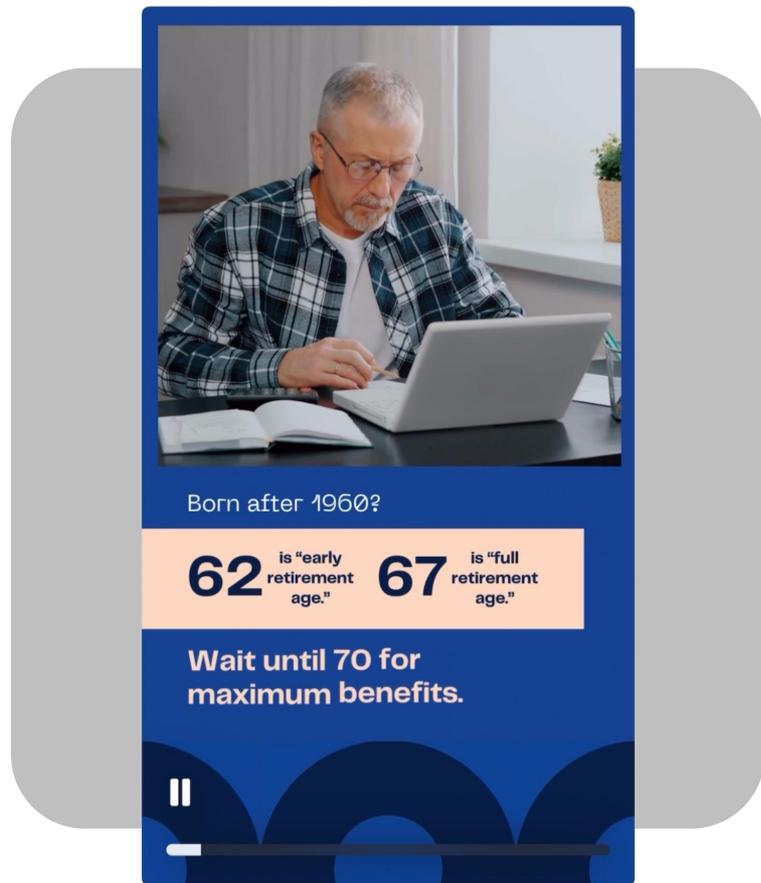
- Use a mixture of B-Roll and “Talking Head” videos
- People want to see the PERSON behind the Business!



Source: <https://www.instagram.com/wealthfinancialadvisor/>

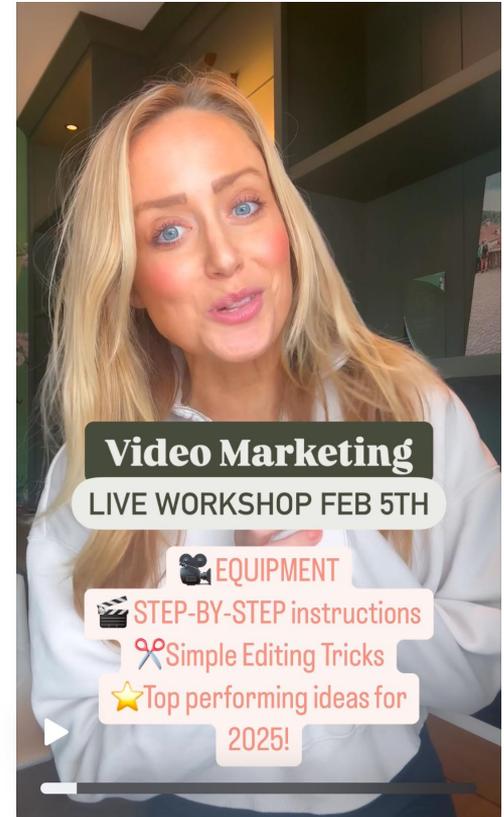
Video: The format instagram LOVES

- FMG provides Instagram Reels already-done-for you!
- You can post as is or customize!



Source: FMG Instagram Reels Collection

On Phone, Edit Vertical Videos for Social Media right in Instagram



FMG creates posts, reels
and scripts for **Instagram**
for you!

Facebook



Facebook Groups are really underutilized by advisors.

There are local groups in every area in our country

Gig Harbor Moms
Anonymous member · Dec 27, 2023 · 🌐

Looking for a financial advisor for our personal finances and also for an S Corp business. Any recommendations?! Thank you!

4 Answers

👍 Like 💬 Answer

Gig Harbor Moms
[Redacted]

Hello, my husband and I are seeking a local reliable financial advisor. We never had one before so any advice would be greatly appreciated! 😊 ✨ Thank you!!

👍 1 11 Answers

👍 Like

Gig Harbor Moms
[Redacted] 23 · 🌐

To piggy back off the other mom's post:

We have a decent income, but I'd love to make it go further. Financial advisor suggestions? We've been saying we'd do this for YEARS and I am finally going to do it 🙌

👍 7 10 Answers



Eric J. Negrón, 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?”

Anonymous member's Post



Anonymous member

October 19, 2022 · 🌐

My husband and I are looking for a financial advisor. Mainly for retirement purposes. Does anyone have recommendations they have used? Thanks!

👍 2

22 comments

👍 Like

💬 Comment

📧 Send

Top comments ▾



Tricia Roth Top Contributor

We work with Evergreen Wealth Management out of Williamsport. Were happy with them.

1y Like Reply



Sara Bamat

Second vote for Chris Smith with Northwestern, he's great!!

1y Like Reply



Molly Lucas-Beck

David Panko or Ash at Strong Tower Associates, both in State College.

1y Like Reply Edited



Natalie Smithmyer

Stephanie Harris Gordon can you be of assistance? ...

1y Like Reply

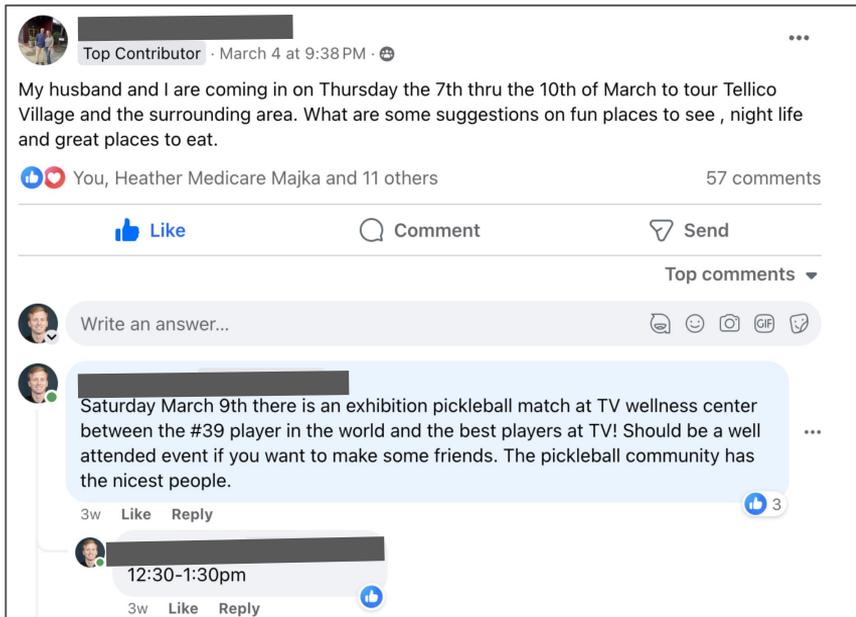


Stephanie Harris Gordon

Natalie Smithmyer sure

We can help. Joe does financial roadmaps for free for people all the time. Please reach out to me at [REDACTED] or visit us at [REDACTED]





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 TV library April 16 at 10am if you want to learn more.

Great Example of how to use Facebook

██████████ 5:53 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

4 comments

What type of content to share on Facebook?

- **Charts** and **images**
- Capitalize on **trending stories**



White and Associates

April 2 at 1:00 PM · 🌐

Egg prices were at an all-time high of \$8.17 a dozen in early March but have since trended lower. What's behind the sudden turn? The main reasons are weaker consumer demand, the bird flu coming under control, and ramped-up supply.

Egg Prices Finally Crack

Price of a dozen eggs since October 2024



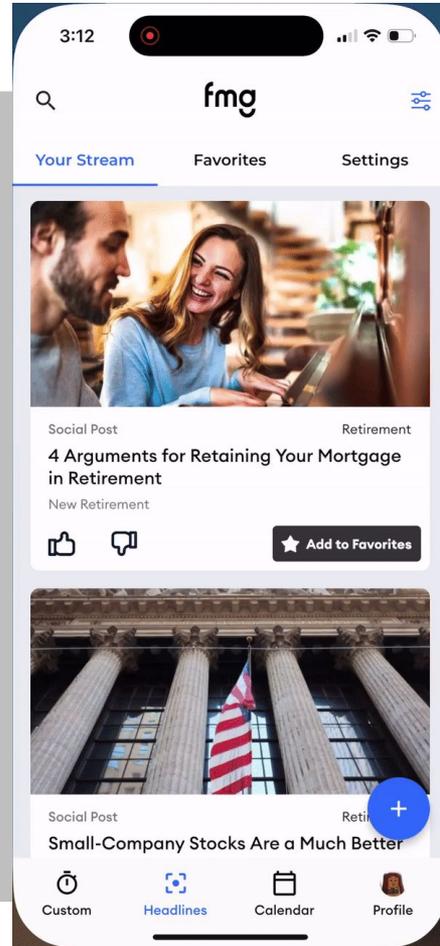
TradingEconomics.com, March 19, 2025



2

Get AI powered captions in the FMG Mobile App

- Choose your article
- Let AI write the caption for you
- Keep, re-write or edit!
- Share right from the app



'Do It For Me' Marketing

- Monthly **content marketing** plan with customization tips
- Your own dedicated **Marketing Concierge**
- Increase **client** engagement, **drip on prospects and COIs**
- Take the **heavy lifting off** your plate
- **5-star content** exclusively written by Sam & Susan



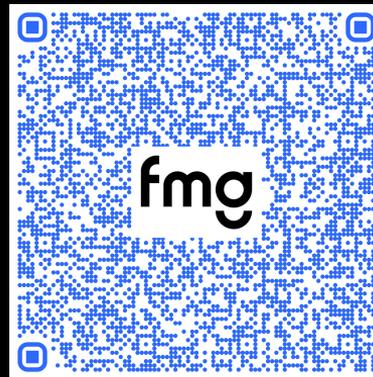
Samantha Russell
Chief Evangelist, FMG



Susan Theder
CMO/CXO, FMG

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1 O: April Fools' Day B: Spring Into Financial ...	2 O: World Autism Aware... E: Spring Into Financial ...	3 S: Spring Into Financial ...	4 A: Monthly Market Insig...	5 S: Beef Up Your Passwor...
6 S: 30th Anniversary of N...	7	8 S: Here's How Much Mo...	9	10 O: National Siblings Day	11 S: How To Launch A Suc...	12 O: Passover
13	14 A: Video of the Month S: What Tax Docs To Ke...	15	16 B: From College Accept...	17 E: From College Acceptances to Affordability: Insights for Families in the Final Stretch - Clients and Prospects	18 College Accept...	19
20 O: Easter	21	22 S: Earth Day	23 S: Administrative Profe...	24 O: National Bucket List ...	25 O: National Take Our Da...	26

Scan to
learn more
about Do It
For Me >>



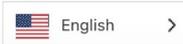
Book Your 20-Minute Consultation

What to expect:

We'll begin by listening to your goals and challenges, then provide tailored recommendations on how to best leverage the FMG platform to help you achieve them.

-  **Understand Your Needs**
-  **Explore FMG's Most Relevant Solutions**
-  **Provide Tailored Recommendations**

If you're a current FMG customer with a product-specific question, please visit the [Support Page](#).



Take the next step toward better marketing results

No obligation. Just guidance.

[Schedule Your Call](#)

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				