

fmg

Unveiling of the 2026 Marketing Guide



HAPPENING **LIVE!**





The New Era of Marketing

2026 Marketing Guide for Financial Advisors



reviews (“Great advisor!”) provide minimal value. Reviews with specific details to recommend you for relevant searches. Encourage specificity toward particular language. In your review request, include

“What challenges were you facing when we started working together?”
“How do you describe the communication and support you’ve received?”
“How do you compare our firm to others in [City Name looking for a financial advisor]?”

Review Request System

Your review request system doesn’t require complicated systems – these simple steps make collecting testimonials.

Email Campaign

Send an email to your entire client base explaining that you’re committed to providing the best service. Ask all clients to share honest experiences. Include a direct link to your review request and reassurance that you value all feedback.

“If you’ve given us a review, remove them from automated review request emails.”

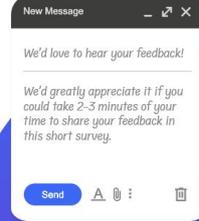
Use **email templates** to get started. Review the [legal and compliance disclosures](#) required by your firm. [Learn more >](#)

Follow-up Requests

Send a follow-up email 3-5 days after the request and including a request for feedback.

“Thank you for requesting a review 3 days ago. We’d love to hear your feedback!”

“We’re glad to hear [e.g., it was great meeting with you on [topic]]. If you have a moment, please provide your honest feedback:”



Only 10% of SEC-registered firms leverage testimonials on their website.

This creates a massive opportunity for differentiation.*

We Want to Hear From You!

We will randomly choose people who ask questions or leave comments to win fun swag!

→



01

SECTION 1

Get Found Online

How to **appear in AI search results** and **convert that visibility into genuine client confidence**

I want to be found in ChatGPT and AI Search

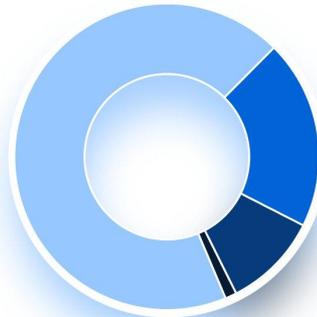
I want prospects to trust me before we ever speak

I want to start using testimonials the right way

The AI Search Revolution

How consumer search behavior is transforming [2020 Vs. 2026]

2020:
Traditional Search



Text Keywords	~70%	■
Voice Search	~10% (mobile voice ~20%)	■
Image Search	~20%	■
Visual (camera or AR)	<1%	■
Conversational AI Search	~0%	□
Multimodal Search	~0%	□

2026:
AI-Powered Search



Text Keywords	~25%	■ (Sharp decline)
Voice Search	~20-25%	■ (Rising)
Image Search	~15%	■ (Slight decline)
Visual (camera or AR)	~10%	■ (Rapid growth)
Conversational AI Search	~25%	■ (Major new segment)
Multimodal Search	~5%	■ (Emerging use)

WHAT TO DO NEXT:

Optimize for queries and answers. In an AI-first search world, visibility goes to the brands that explain best, not the ones that keyword-stuff hardest.



Focus On 3 Things:

- **Get Reviews** - The more REAL people are talking about you, the better. Publish those reviews on your website
- **Build Reputation** - publish different types of content, land on podcasts and other prominent sites, get quoted in the media, apply for industry awards
- **Format content for AI** - focus on longform content, Q&A and FAQ pages both onsite and offsite, schema markups, and add quick summaries to content

Customer Case Study: Drucker Wealth

Here are several firms that explicitly advertise their expertise in helping Amazon employees:

- **Avier Wealth Advisors:** This firm details its experience with Amazon's RSU vesting schedule, the mega backdoor Roth conversion, and strategies for managing concentrated stock positions.
- **Brighton Jones:** This company has a long history of advising Amazon employees and has partnered with Connect@Amazon to offer resources on maximizing RSUs, 401(k)s, and other benefits.
- **Consilio Wealth Advisors:** Consilio focuses on tech professionals and understands the unique compensation structure at Amazon, including how to handle RSUs and the 401(k).
- **Drucker Wealth:** With experience working with Amazon product managers and engineers, Drucker Wealth helps clients navigate RSUs and after-tax 401(k) contributions.



How Did They Do It?

The screenshot shows a website for Drucker Wealth, a financial planning firm. The page features a navigation menu with links for 'ABOUT US', 'WHO WE SERVE', 'WHAT WE DO', 'GET STARTED', 'BLOG', and 'RESOURCES'. The main content area has a large image of a diverse group of professionals in a meeting, with the title 'Amazon Employee Financial and Equity Compensation Planning' overlaid. Below the image is a horizontal menu with categories: 'MID-CAREER PROFESSIONALS', 'GOOGLE EMPLOYEES', 'AMAZON EMPLOYEES' (which is underlined), 'META EMPLOYEES', and 'WALMART EMPLOYEES'. The main heading is 'Our Experience Working With Amazon Employees'. To the left of the text is an illustration of a woman working on a laptop. The text describes the firm's experience with Amazon clients, mentioning RSUs, after-tax contributions, and 'Financial Life Plans®'. In the bottom right corner, there is a 'BrokerCheck' logo with a 'FINRA' sub-label.

DRUCKER WEALTH
Financial Planning | Wealth Management

ABOUT US WHO WE SERVE WHAT WE DO GET STARTED BLOG RESOURCES

Amazon Employee Financial and Equity Compensation Planning

MID-CAREER PROFESSIONALS GOOGLE EMPLOYEES AMAZON EMPLOYEES META EMPLOYEES WALMART EMPLOYEES

Our Experience Working With Amazon Employees

Our team has a wealth of experience in working with clients at Amazon. If you work at Amazon, it's likely you've been granted stock as part of your overall compensation package. We've helped product managers make decisions around their RSUs, engineers add after-tax contributions to their 401(k)s. And we've designed **Financial Life Plans®** that are tailored for Amazon employees to achieve their goals.

BrokerCheck
FINRA

Step 1: Build a Page that Answers Questions Your Target Audience is Asking

What is Amazon's RSU Vesting Schedule?

Most clients we've seen at Amazon have vesting schedules that operate under the 3-4 year semi-annual schedule.

Here's Amazon's vesting schedule:

- Year 1: 5%
- Year 2: 15%
- Year 3: 40%
- Year 4: 40%
- And Years 1 and 2 are each a cliff, followed by semi-annual payouts in Years 3 and 4.



So the same 100 shares at Amazon would be paid out like this:

- Beginning of Year 2 | 5% payout for Year 1: 5 shares
- Beginning of Year 3 | 15% payout for Year 2: 15 shares

More is More - Be as Specific as Possible!

Contribution Limits For Your **Amazon** 401(k):

The IRS imposes limits on the money that you can contribute to your 401(k).

Your contributions to the Traditional (Pre-Tax) and the Roth accounts cannot exceed \$23,500 per year combined.

For example, you can contribute \$23,500 Traditional to your **Amazon** 401(k) or \$23,500 to your Roth 401(k), or \$10,000 to the Traditional and \$13,500 to the Roth, but the aggregate can be no more than \$23,500.

Helpful tip: if you moved to **Amazon** midway through the year, your contributions at your previous firm count as part of this \$23,500 so it's important to include those figures in determining your eligibility.

After-Tax Contributions at **Amazon**:

Amazon also has an After-Tax 401(k) that you can contribute money into ON TOP OF the \$23,500 that we've already discussed.

The IRS allows you (as an employee) to contribute a maximum of \$70,000 to your 401(k) across all contribution types. This includes: Traditional (Pre-tax) + Roth contributions, + company match + the After-Tax portion.

(Important reminder: an After-Tax 401(k) is separate and different from contributing to the Roth 401(k) as we've described it above.)

Mega Backdoor Roth IRA at **Amazon**

Here's why we LOVE **Amazon**'s plan & in particular what you can do to maximize it.

How FMG Helps

Blog & Website Content That Keeps You Relevant



Marketing Schedule **Inbox** 1 **Drafts** 5 **Compliance** 14 Samantha Russell

Muse BETA
AI Content Builder

Start Over Back To Sidekick

Preview

Writing style: **The Custodian**

Title

Year-End Financial Checklist for Families with Donor-Advised Funds and Family Trusts

Body

As the year draws to a close, families often find themselves reflecting on their financial achievements and setting goals for the upcoming year. For those managing donor-advised funds and family trusts, the end of the year is an opportune moment to ensure that their financial affairs are in order and aligned with their long-term goals. Here's a comprehensive checklist to guide families through essential year-end financial tasks.

1. Review And Update Your Donor-Advised Fund Contributions

Donor-advised funds (DAFs) offer a flexible way to make charitable contributions while receiving immediate tax benefits. As the year ends, review your contributions to maximize your tax benefits. Consider the following

< 1 of 1 >

Use As Draft

The displayed information might be inaccurate, make sure to proofread before using.

Writing style: **The Custodian**

Length: Medium

Details: Write me a blog post about year end financial tasks families want to be sure and do, especially if they have Donor advised funds and family trusts

Sidekick

Content created

Sidekick

How would you like to adjust the content?

Rephrase Make longer Make shorter Add emojis

Writing style: **The Custodian**

Tell me how we can make your content better...



Step 2: Add an overall FAQ page to your site, plus FAQ widget to the bottom of other pages

Amazon Benefits Frequently asked questions:

Who has access to After-Tax 401(k)?

+

How do After-Tax 401(k) contributions work at Amazon?

+

What is a Mega Backdoor Roth IRA?

+

How FMG Helps

Automatically Add: FAQ Sections & Schema Markup

Add a new section

What type of content do you want to add?

- Text
- Image
- Boxes
- Forms
- Team
- Carousels
- Widgets

Article Library



January 31, 2024
Getting a Head Start on College Savings
A few strategies that may help you prepare for the cost of higher education.



January 31, 2024
9 Facts About Retirement
Regardless of how you approach retirement, there are some things about it that might surprise you.



January 31, 2024
A Taxing Story: Capital Gains and Losses
Understanding how capital gains are taxed may help you refine your investment strategies.

FAQ Section

What's the difference between a Roth IRA and a traditional IRA?

A traditional IRA allows for tax-deductible contributions (subject to income limits), with withdrawals taxed as ordinary income in retirement. A Roth IRA uses after-tax contributions with tax-free withdrawals in retirement. The choice between them often depends on your current tax situation, expected future tax rates, and retirement timeline.

How much should I save for retirement?

While individual situations vary, many financial professionals suggest saving 10-20% of gross income for retirement. However, this percentage may change based on factors like your age when you start saving, desired retirement lifestyle, and other sources of retirement income. We can help you determine a savings rate that aligns with your specific retirement goals.

What is an emergency fund and how much should I have?

An emergency fund is money set aside for unexpected expenses like job loss, medical bills, or major home repairs. Most financial professionals recommend saving 3-6 months of living expenses in a readily accessible account. The exact amount depends on your job stability, family situation, and personal risk tolerance.

Step 3: Add a Lead Capture to the Page



👉 Download the free guide:

"What Issues Should I Consider Regarding My Restricted Stock Units?"

How Do Restricted Stock Units (RSUs) work at Amazon?

An equity grant of Restricted Stock Units (RSUs) is the primary way that Amazon employees receive Amazon stock. One unit of Restricted Stock conveys your right to receive one common share of Amazon stock at a specific time in the future according to a designated “vesting” schedule.

Once your shares vest, you own the shares outright just like anyone else that owns Amazon Stock. There is a possibility you may have to hold the stock for a period of time due to the company’s insider trading policy.

What is Amazon's RSU Vesting Schedule?

How FMG Helps

1. Choose any of our pre-made guides →

fmg

- Website >
- Blog >
- Automated Marketing
- Email >
- Social >
- Events >
- SETTINGS
- Profile >
- Contacts >
- EXTRAS
- Help >

Marketing Schedule Inbox 1 Drafts 5 Compliance 14 Samantha Russell 

Content Library

whitepaper Search

Category Author [Reset filters](#)

Title ↑	Category	Type	Author	
2025 Tax Planning Whitepaper	Downloadables	Whitepaper/Ebook	FMG	Use
4 Critical Social Security Facts	Downloadables	Whitepaper/Ebook	FMG	Use
4 Financial Strategies for Physicians	Downloadables	Whitepaper/Ebook	FMG	Use
5 Estate Considerations for the LGBTQ+ ...	Downloadables	Whitepaper/Ebook	FMG	Use
5 Retirement Strategies for Small-Busine...	Downloadables	Whitepaper/Ebook	FMG	Use
59 1/2: Why is this Age So Important?	Downloadables	Whitepaper/Ebook	FMG	Use
6 Important Financial Strategies for Your...	Downloadables	Whitepaper/Ebook	FMG	Use
6 Retirement Questions Government Em...	Downloadables	Whitepaper/Ebook	FMG	Use
7 Principles of Long-term Investing	Downloadables	Whitepaper/Ebook	FMG	Use

5 Retirement Strategies For Small-Business Owners

Small-business owners face different retirement planning needs as they consider their business's financial future. This whitepaper explains important things that small business owners should consider when preparing for retirement.

How FMG Helps

1. Choose any of our pre-made guides →
2. Add your logo
3. Put on any page of your site!



Author
FMG

Type
Whitepaper/Ebook

Keywords

- Downloadable
- Retirement Whitepaper
- Employee Owner
- Qualified
- Retirement Planning
- Retirement Strategy
- Small Business
- Challenge

Whitepaper

- ✓ Editable Canva Template
- ✓ Instructions Included
- ✓ 8 Page Document

Download as PDF

Download

As a business owner, you face unique challenges when building a financial future. This report provides insights into mistakes small business owners often make and steps to take when building toward the retirement you desire.

5 RETIREMENT STRATEGIES FOR SMALL-BUSINESS OWNERS And How to Address Them

YOUR LOGO

Customize with your brand

Canva

Close

Download

Step 4: Display Client Testimonials

[Client Access](#) [Schedule a Call](#)



[ABOUT US](#) [WHO WE SERVE](#) [WHAT WE DO](#) [GET STARTED](#) [BLOG](#) [RESOURCES](#)



Chelsea

8 reviews



6 months ago

Positive: Professionalism, Quality, Responsiveness, Value

They are phenomenal! Gideon breaks down everything really well and updates me consistently so I never feel in the dark. I've never felt more confident in my finances than I do now and Drucker Wealth Management is solely responsible for that!



Abby

2 reviews



7 months ago

Positive: Professionalism, Quality, Responsiveness

Gideon Drucker and his team have been monumental in assisting me in planning for the future, short and long term. He is honest, professional, and very patient with both my continued questions and need for scheduling flexibility. Everyone is very quick in responding and organizing all the moving parts involved in financial planning. Using a fiduciary was very important to me and I have no question that Gideon is looking out for my best interests; this group has certainly relieved any anxiety I had concerning asset management. I have only been a client for a couple months but look forward to continue working with this company.



Why AI Tools Lean on Reviews:

1. Reviews are a “trust” signal. REAL people have used this business.
2. The language clients use in the review gets “tied” to your brand
3. The more you are mentioned along with certain keywords, the more you will be “known” to AI for those words





Collecting & Displaying Testimonials →



Do:

- Ensure everyone has an equal opportunity to share feedback
- Use a consistent and unbiased approach
- Ensure client has provided permission to share their testimonial
- Maintain a record of the process

Don't:

- Ask only your favorite clients
- Tell your clients what to write or encourage only positive responses
- Engage in any form of review-gating
- Offer or imply compensation*

Compliance Considerations

Have A Process.
Write It Down.
Prove You Followed It.



Email Option B:

Subject: Quick favor

Hi {{FirstName}},

*Would you mind taking a minute to share your **experience with our firm?***

You'll also be given an option to share your feedback publicly on Google. If you are comfortable partner with our team.

Email Option A:

Subject: We'd love to hear your feedback!

Hi {{FirstName}},

We take our fiduciary obligation seriously, and part of that means gathering real, unbiased feedback from our clients. We want to know what we are doing well and where we have room for improvement.]

*We'd greatly appreciate it if you could take 2-3 minutes of your time to share your feedback in this short **survey**.*

*Sincerely,
<advisor name>
<company name>*

02



SECTION 2

Stay Active & Visible on Social Media

Leverage **AI for content creation** while **maintaining a human voice that builds real connections**

I want to be active on social media, but I don't know the best way to do it

I want to have actual conversations with my target clients on social media

I want to show up on social media but I don't have the time to post consistently

Visibility Creates Trust



Compare Your First Impression of This...

ROBERT LU · 3rd
Wealth Management Advisor | Investment & Portfolio Strategist |
Helping Clients Achieve Financial Goals
United States · [Contact info](#)
500+ connections

[Message](#) [+ Follow](#) [More](#)

UIC Mechanical and Industrial
Engineering at the...

Vs. This....



STEWARD PARTNERS

BUSINESS ISN'T ABOUT TRANSACTIONS. IT'S ABOUT PEOPLE.

Great leaders build relationships that outlast generations.

THE HIGH PERFORMANCE LIFE
PODCAST

Tune In and Redefine Your Legacy

Scott Danner ✓ · 1st

Impact Leader positioning financial advisors and business owners for relationship-driven transitions—so their legacy outlives their career | EVP, Steward Partners | Podcast Host

Chesapeake, Virginia, United States · [Contact info](#)

Steward Partners

Radford University

LinkedIn icon, Notification bell icon

Or This....

Top 100 Advisor (*Investopedia*)
Top 23 Millennial Advisor (*Business Insider*)

financial advice & education for **our generation.**



AS SEEN IN

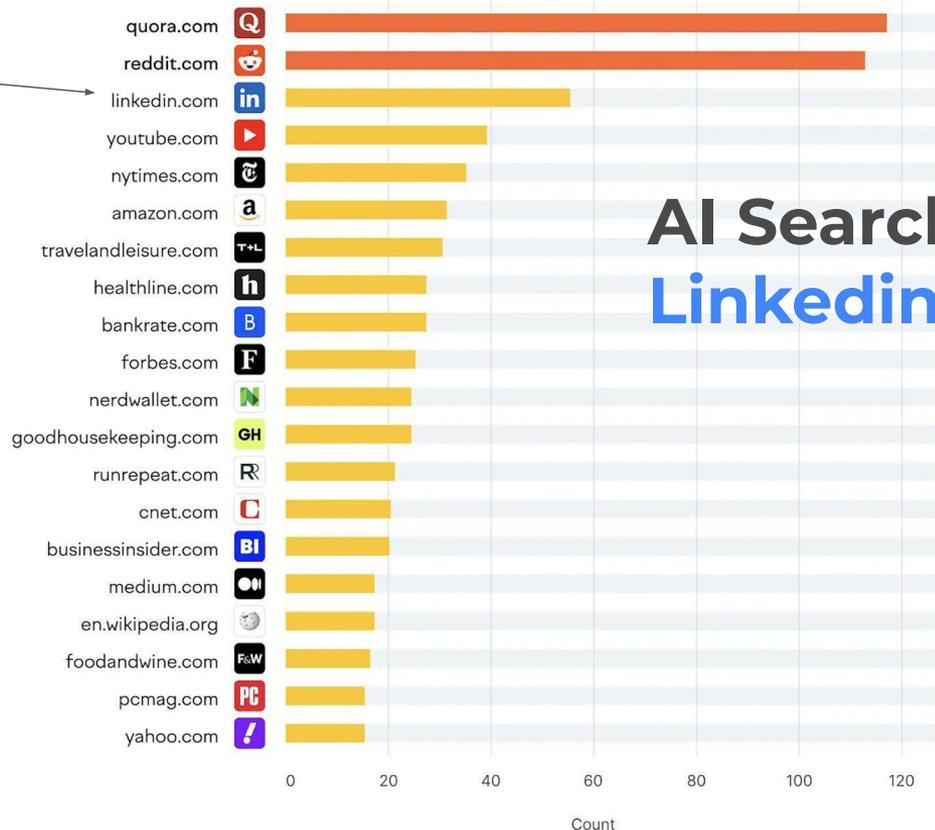
BUSINESS INSIDER BARRON'S FORTUNE
yahoo! finance MORNING BREW



Thomas Kopelman  · 1st
Financial Planner Helping 30-50 year old Business Owners and Those With Equity Comp Build Wealth 💰. Co-Founder at AllStreet Wealth. Head of Community at Wealth.com
Indianapolis, Indiana, United States · [Contact info](#)
[Apply to work with me](#) 
18,190 followers · [500+ connections](#)

 AllStreet Wealth
 Butler University

Most Cited Domains in Google AI Overviews



AI Search Leans Heavily on
LinkedIn

Make Your Plan For 2026

The 2026 Consistency Framework

Consistency beats perfection. Here's a realistic posting cadence for busy advisors:

Minimum Viable Presence:

- 3 posts per week on LinkedIn
- Engage with 4-5 posts daily (10 minutes)
- Respond to all comments on your posts

Advanced Strategy:

- Daily LinkedIn posts
- Multi-platform presence (LinkedIn, Instagram, YouTube)
- Video content 2-3x per week
- Active participation in LinkedIn groups or conversations

Growth Mode:

- 4-5 posts per week on LinkedIn
- 1-2 posts per week on Instagram or Facebook
- Daily engagement (15 minutes)
- Monthly content batching session



Remember: Posting inconsistently (3 posts one week, nothing for two weeks) hurts you more than posting less frequently but consistently.

How FMG Helps

Choose from Automated Social Campaigns

Share "Changing Jobs And Your 401(K)"

Show your clients and prospects that you understand their entire financial situation by using this social sequence on employer-sponsored retirement plans. The social sequence may prompt a question or two about the role their 401(k) should play in their overall retirement strategy.

Content Type
Social Sequence
4 Posts

Author
FMG

Keywords
2024 Jobs Ira
401(K) Employer
Assets Financial
Account Money
Retirement Taxes
Sequence Traditional

Social Profile Name
@socialhandle

CHANGING JOBS? DON'T FORGET YOUR RETIREMENT PLAN

The average employee stays with their company for only 3.9 years. If you have recently changed jobs or are thinking about changing jobs, you may have to make some decisions when it comes to changing jobs and your retirement plan.
Source: BLS.gov, 2025

Delay 7 Days

Close Use Sequence

How FMG Helps

Stand Alone Posts Designed for Engagement

Share "Identity Theft Awareness Week: One Small Change [Carousel]"

Encourage clients to take one small, practical step to protect their information during Identity Theft Awareness Week.

Author
FMG

Keywords

Downloadable

Instagram

Cybersecurity

Carousel

Identity Theft

Social Media Assets

Fraud

IRS Scam

Financial Education

Passwords

Consumer Protection

Mfa

Identity theft reports and losses are rising—but protection doesn't have to be complicated.

Sometimes the best defense is one simple habit: changing an old password, turning on MFA, or pausing before clicking a link.

This Identity Theft Awareness Week, pick one small thing you can do better—and do it today.

#IdentityTheft #FraudPrevention #CyberSafety
#FinancialEducation



Close

Use Post

How FMG Helps

**Or Customize any
post with MUSE,
our AI Tool**

Most Important: Follow The 80-20 Rule 🙌 🙌

For every **1** thing you post on social media,
Comment on **5** others' posts.

What Does Daily Engagement Look Like?

Choose 5 Posts To Comment On:

1. Don't just say "great post!". **Add something of value**

2. Don't comment on the same people's posts every week - choose new **2nd or 3rd degree connection**

3. **Pro Tip:** If the comment gets a lot of engagement on its own, that's a clue that it would make for a great stand-alone post on your own page

Daniel Crosby, Ph.D. · 1st
Chief Behavioral Officer at Orion Advisor Solutions
6d · 🌐

Lie: Money is the only type of wealth.

In reality, there are 5 types of wealth:

- Financial (money)
- Social (relationships)
- Physical (health)
- Mental (knowledge, faith)
- Time (freedom)

The pursuit of financial wealth can rob you of the others.

Don't let that happen.

- via [Sahil Bloom](#)

👍❤️ Steve Gresham and 1,066 others · 70 comments · 73 shares

Reactions

👍 Like · 💬 Comment · ➦ Share · 📧 Send

Add a comment...

Most relevant ▾

Samantha Russell · You · 6d ...
Chief Evangelist at FMG Suite & Twenty Over Ten | Investment New...

The origin of the word "wealth" comes from Old English "wele" & originally meant "well-being"

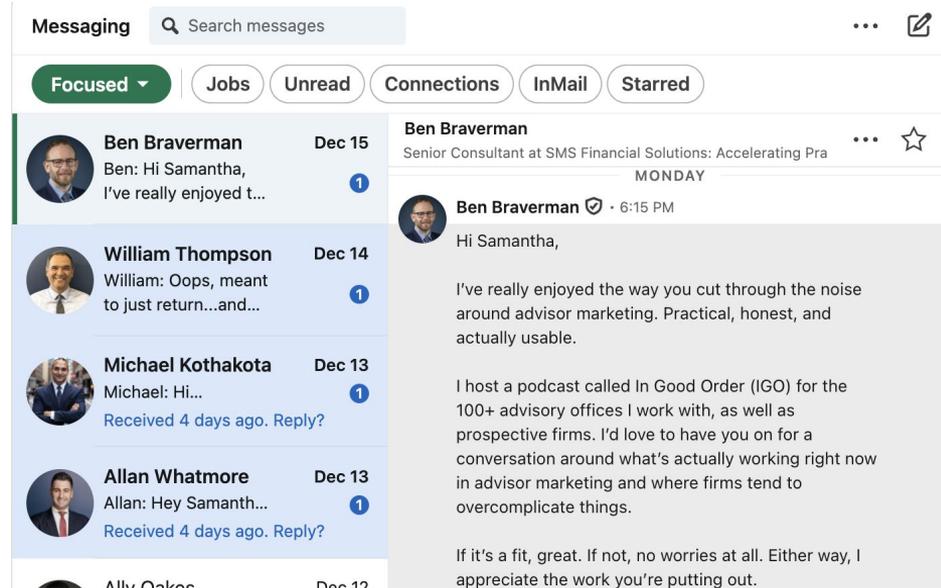
Before taking on connotations of \$, wealth referred to the welfare of people; their general happiness and joy.

"Wealth" means a lot more than just money. It always has - we just forgot!

Like · 🌐❤️ 59 · Reply · 3 Replies

How To Use DM's Strategically

1. Send a **DM to someone who left a comment** on your post thanking them for taking the time
2. Invite a SME to join your podcast, a webinar, or other event
3. Send invites to an event your hosting
4. Send messages to someone mentioning content they posted and how much value you found in it
5. When someone connects with you – send a follow up messages saying “hello”.



03

fmg

SECTION 3

Email Consistently With Content People Actually Read

Build an **email strategy** that can **run on autopilot without losing the personal touch that keeps clients engaged**

I want emails people actually read

I want to communicate with clients & prospects consistently with relevant and valuable info – but I don't have time

I want to respond quickly when breaking news comes out

Most Widely Used Marketing Strategies By Financial Advisors

Marketing Strategy	% of Advisors Using
Client Referrals	93%
COIs	60%
Networking	47%
Social Media	42%
Client Appreciation	36%
Website	31%
Blogging	30%
Education Events	29%
Seminars	26%
Firm Brochure	26%
Drip Marketing	24%
SEO	22%



Marketing Strategy	% of Advisors Using
Videos	12%
Paid Web Listings	11%
Online Ads	10%
Marketing Consultant	10%
Direct Mail	9%
Paid Advertising	8%
Webinars	8%
Book	7%
Solicitors	7%
Podcasts	7%
Radio	5%
Custodial Referrals	5%
Marketing Lists	3%

© kitces.com LLC

Make Your Plan For 2026

The Foundation: Types of Emails That Drive Results

Build your communication strategy around these essential email types:



Email Newsletter: Your Regular Touchpoint

Weekly or monthly updates keep you top of mind with firm and industry news. The key is consistency – pick a schedule and stick to it.



Automated Drip Series: Set It and Forget It

From prospecting to new client onboarding, drip emails nurture relationships automatically. These sequences provide ongoing education and engagement without requiring your daily attention.



Timely Content: When Markets Move

Market volatility and breaking news create anxiety. Strategic communications during these moments offer reassuring context and remind clients to stay focused on long-term goals. This is where speed matters.



Personalized Lifestyle Content: Beyond Finance

Track client hobbies in your CRM – wine, cooking, golf, pickleball – and send relevant content that shows you see them as whole people, not just portfolios.

How FMG Helps:

FIRST:

- Collect prospect emails on your site

THEN:

- 2x month send valuable, educational, **TIMELY** content that is **HELPFUL**
- Gets even more effective if you have a niche

The image shows two screenshots from the THRIVE website. The top screenshot is a lead generation form titled "LEARN HOW TO AVOID THESE 6 COMMON TAX ERRORS". It includes fields for "First Name", "Last Name", and "Email", and a "GET EBOOK" button. Below the form, it says "Financial Planning clients on an as-needed basis." and "GET FINANCIAL NEWS & UPDATES DELIVERED TO YOUR INBOX". The bottom screenshot is an email sequence configuration interface titled "Prospects Only - Thank You For Downloading 'Common Tax Errors'". It shows a preview of the email content, including a "Thank You For Downloading - Here's How We Can Help" section. The email content includes a personalized greeting "Hi {Firstname},", a thank you message, and a brief introduction of the firm's services. The configuration interface includes a "Type" dropdown set to "Email Sequence", an "Author" field set to "Do It For Me", and a "Keywords" section with tags for "Clients", "Email", "Finance", "Goals", "Insights", "Management", "Relationships", "Solutions", "Strategies", "Taxation", and "Wealth". There are also buttons for "Download As PDF", "Expand Email", "Close", and "Use Sequence".

THRIVE
5170 Golden Foothill Parkway
El Dorado Hills, CA 95762
916.235.8240
scott@thrivefinancialplanning.com

Client Login

LEARN HOW TO AVOID THESE 6 COMMON TAX ERRORS
Knowing how you need to file your taxes depends on your income and filing status, as well as which deductions and credits you can claim. In this free ebook, we share some common errors to avoid.

First Name Last Name Email

GET EBOOK

Financial Planning clients on an as-needed basis.

GET FINANCIAL NEWS & UPDATES DELIVERED TO YOUR INBOX

Prospects Only - Thank You For Downloading "Common Tax Errors" 2 Emails

An email sequence covering the many mix-ups and mistakes taxpayers make and what can be done to better manage their tax situation.
Customize before use. Add this Lead Generation ebook to your homepage or to a custom page and add your link to all emails.

Thank You For Downloading - Here's How We Can Help

Download As PDF Expand Email

Hi {Firstname},

Thank you for downloading *Common Tax Errors*. We hope it offers valuable insights as you navigate your financial journey.

Since you've taken an interest in this resource, we wanted to share a little about who we are. At [Insert Firm Name], we've been helping clients manage their wealth for over [X Years] years. Our firm specializes in [Insert Specialization/Services, e.g., "comprehensive retirement strategies, wealth management, investment approaches"], tailoring each solution to meet the unique needs of each client.

What sets us apart is our commitment to building genuine, lasting relationships and delivering personalized strategies that align with your

Type
Email Sequence

Author
Do It For Me

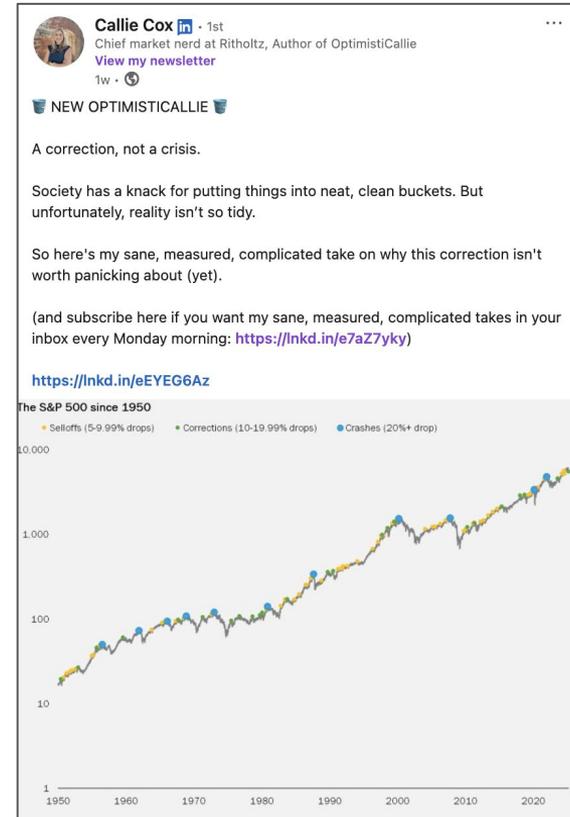
Keywords
Clients Email Finance
Goals Insights Management
Relationships Solutions
Strategies Taxation Wealth

Close

Use Sequence

Build Your Email List with Social Media

1. Post a preview of what you talk about in your emails
2. “If you want to get more content like this – sign up for our newsletter”
3. I recommend doing this at least 2x month
4. If someone engages on your posts, send them a personal invite via DM



04

fmg

SECTION 4

Create Meaningful Connection: Your Human Advantage

Leverage video and events as your true differentiator, **creating memorable experiences that AI can't replicate**

I want to use video, but I don't know how

I want my marketing to feel personal and show the real value of my practice

I want to host events that people will rave about

Most Widely Used Marketing Strategies By Financial Advisors

Marketing Strategy	% of Advisors Using
Client Referrals	93%
COIs	60%
Networking	47%
Social Media	42%
Client Appreciation	36%
Website	31%
Blogging	30%
Education Events	29%
Seminars	26%
Firm Brochure	26%
Drip Marketing	24%
SEO	22%

Marketing Strategy	% of Advisors Using
Videos	12%
Paid Web Listings	11%
Online Ads	10%
Marketing Consultant	10%
Direct Mail	9%
Paid Advertising	8%
Webinars	8%
Book	7%
Solicitors	7%
Podcasts	7%
Radio	5%
Custodial Referrals	5%
Marketing Lists	3%



Events: Your Secret Weapon for Differentiation

Events aren't just about providing information – they're about creating memorable experiences that attendees will want to share.

Event Frequency and Planning

Start where you are and build momentum:

- **Initial Stage:** Host 2 events per year
- **Growth Stage:** Aim for quarterly events (4 per year)
- **Advanced Stage:** Add timely events on trending topics to your schedule

We recommend mixing virtual and in-person events to maximize reach and engagement.

A Great Advisor Example:

This event lead to 2 new client relationships!

This is image was added to the "events" section of the from the advisors' website.

Please join us for:
Preparing for a Successful Succession

Topics will include:

- **Business succession planning** requires addressing financial, legal, and tax considerations and often involves a coordinated team of advisors to navigate complexities effectively.
- **Owner readiness is crucial**—many business owners struggle with questions like "Will I have enough money?", "What is my business worth?", and "What's the best way to sell?"
- **Exit strategies** vary and may include intrafamily transfers, sales to key employees, or external buyers—each with unique challenges and opportunities.
- **Common issues** in business exits include unclear valuation, tax liabilities, leadership gaps, and emotional readiness.
- **Having the right team**—including legal, tax, and financial professionals—is essential for a smooth and successful transition out of the business.

With years of experience in the field, they will share invaluable insights and practical knowledge to empower attendees in making well-informed decisions.

Presented by:

Bradley R. Behrendt, CFP®, CPA
Financial Advisor
Tax & Financial Group

Sean McCloskey, CPA, ABV®
Chief Executive Officer
Tax & Financial Group

Warehouse 72
at The Hyatt Regency Irvine
17900 Jamboree Rd, Irvine, CA 92614

Thursday May 15th, 2025

5:30 PM

Bradley R. Behrendt, Financial Advisor (CA Insurance License No. 0D40598) & Sean McCloskey, Investment Advisor Representative (CA Insurance License No. 0G7915). Securities offered through Cetera Advisor Networks LLC (doing insurance business in CA as CFGAN Insurance Agency LLC, CA Insurance Lic# 06444376), member FINRA/SIPC. Advisory Services offered through Cetera Investment Advisers LLC, a registered investment adviser. Tax & Financial Group is

A Great Advisor Example:

Gift Wrapping Event For Clients

This is a great idea being executed from FMG's "DO IT FOR ME" Marketing Program!



Season's Greetings, Ted!

You're Invited to one of our special holiday events - See below for details!

We cant wait to see your creativity while wrapping your loved ones gifts while supplies last accompanied with Christmas music, yummy snacks and drinks! Lets get wrapping and we cant wait to see you there!



How FMG Helps with Events:

Event Builder:

- Everything you need to setup and promote your event digitally

Promotions & Registrations:

- Easily add event to website
- Build landing page
- Send invites to your lists
- For webinars: we even provide the slides!

The screenshot displays the FMG Marketing Tools interface. At the top, the 'fmg' logo is on the left, and navigation links for 'Marketing Schedule', 'Inbox' (with a red notification dot), 'Drafts' (with a grey notification dot), and 'Compliance' (with a red notification dot) are on the right. A user profile for 'Samantha' is also visible. Below the navigation bar, a 'MARKETING TOOLS' sidebar is open, listing options: Content Library, Website, Blog, Automated Marketing, Email, Social, Events (highlighted in blue), Events Intro, My Events, and Create Event. The main content area shows a 'Select An Event Theme' section with four options: 'Blank', 'Halftime Report 2025', 'Generic Event', and 'State of the Markets 2026'. Below this is the 'Event Info' section, which includes a text input for 'Event Name *' containing 'Financial Scams Seniors Should Know About', a checkbox for 'Hide from event lists' with a help icon, and a text input for 'Description *' with the placeholder text 'Describe what your event will entail.' At the top right of the main content area, there are 'Cancel', 'Save Draft', and 'Preview' buttons.

Full Event Checklist Blueprint In The 2026 Marketing Guide!



Events Checklist

Follow these steps to ensure you're creating memorable, strategic experiences that **drive business growth and client engagement**

Pre-Event Planning

- Define clear event objectives (lead gen, education, client appreciation, engagement)
- Choose your event type: virtual or in-person
- Identify target audience and relevant topic
- Choose the date/time, select a location, set your budget and define your goals

Event Design

- Develop agenda and presentation materials
- Identify potential speakers/strategic partners:
 - Collaborate with complementary businesses
 - Virtual: Local estate planning attorneys, real estate agents, tax professionals
 - In-Person: Local wineries, yoga studios, wellness centers

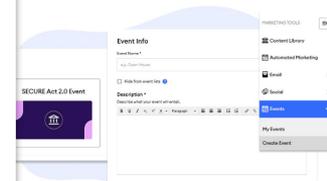
Marketing and Promotion

- Design event branding
- Create a registration landing page
- Develop an email marketing campaign
 - Initial invite (2-3 weeks prior)
 - Reminder emails (1 week, 1 day, day of event)
- Post on social media + create a LinkedIn Event listing
- Reach out to potential partners/influencers
- Send personal invitations to high-value prospects



To build excitement, use language such as: "Several attendees have asked about bringing guests. RSVP now to secure your spot and guest invitation."

...ent easy! Enjoy the flexibility of pre-built
...d content, and harness the power of



...re-changer for promoting our client events. We love
...a landing page to capture RSVPs all within the FMG
...response rates; it saved us time with compliance, and
...website makes our promotions work even better!

Kevin Blodina
B & D Group

Consultation Offer:

...with a free 20-minute consultation tailored to your
...goals and show you exactly how we can help you
...as much or little effort on your part.

[Schedule Now](#)

Want to see how FMG can help you with all this in 2026?

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com

