



LIVE WORKSHOP:

How Two Top Advisors Transformed Their Business with FMG's Do It For Me Program



Marketing That Works:

Results of Working with FMG →



Douglas Howes • 2nd

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20 Year Anniversary - Gratefully Serving our Client...

5d • Edited •

Here's how we doubled our firm's visibility and reduced our workload.

The truth? We don't do it all ourselves. We've been using FMG's "Do It For Me" program to keep our website fresh, our email marketing on point, and our social posts going out regularly.

It's been a huge time-saver and business driver. Just this month, we've had 3 prospective clients offer unsolicited praise for our website, 54% of our sent emails opened, and nearly 6,300 impressions from our social posts on LinkedIn.

Does all this lead to new business? We think so!!! This year we reach our goal for NEW AUM by April - unprecedented in our 20-years of being in business.

Next week, I'm joining a webinar with Chad Parmenter, [Susan Theder](#), and [@Samantha Russell](#) to share what's worked, how we use the program differently, and tips that other advisors can steal.

Doug's Firm Website Blog

[Who We Are](#)[How We Serve](#)[Who We Serve](#)[Insights](#)[Blog](#)[Client Center](#)[Contact](#)

1. Create a Centralized Location for Documents

A folder with important information for heirs, such as account names, numbers, passwords, and locations, as well as the names and contact information for attorneys, accountants, and financial professionals, can help with an estate. Most financial transactions today are online, eliminating once-helpful paper trails.

Compiling estate-related documents—health directives, power of attorney designations, and insurance policies, for example—into one accessible place can help your loved ones during an emotional and stressful time.

While online tools like digital vaults can be helpful, a well-marked traditional folder might help make things easier on heirs. Place this in a fireproof safe, and remember to tell your heirs where to find it so it doesn't become a scavenger hunt at a crucial time.

2. Update Beneficiary Designations

Not reviewing your beneficiaries on retirement accounts and other key contracts and policies can result in unintended consequences.

Typically, a beneficiary designation overrides any instructions detailed in a will. For example, you may leave everything to your spouse in your will, but if your children are named beneficiaries on your retirement account at your passing, the retirement account designation can supersede anything written in your will. As a result, the money in that account could be transferred to your children instead of your spouse, regardless of what your will stipulates.¹

Beneficiaries listed on an account opened long ago may not reflect your current circumstances and may no longer match your estate goals. This can be true in the case of divorce, the birth of a child, or the death of a beneficiary.

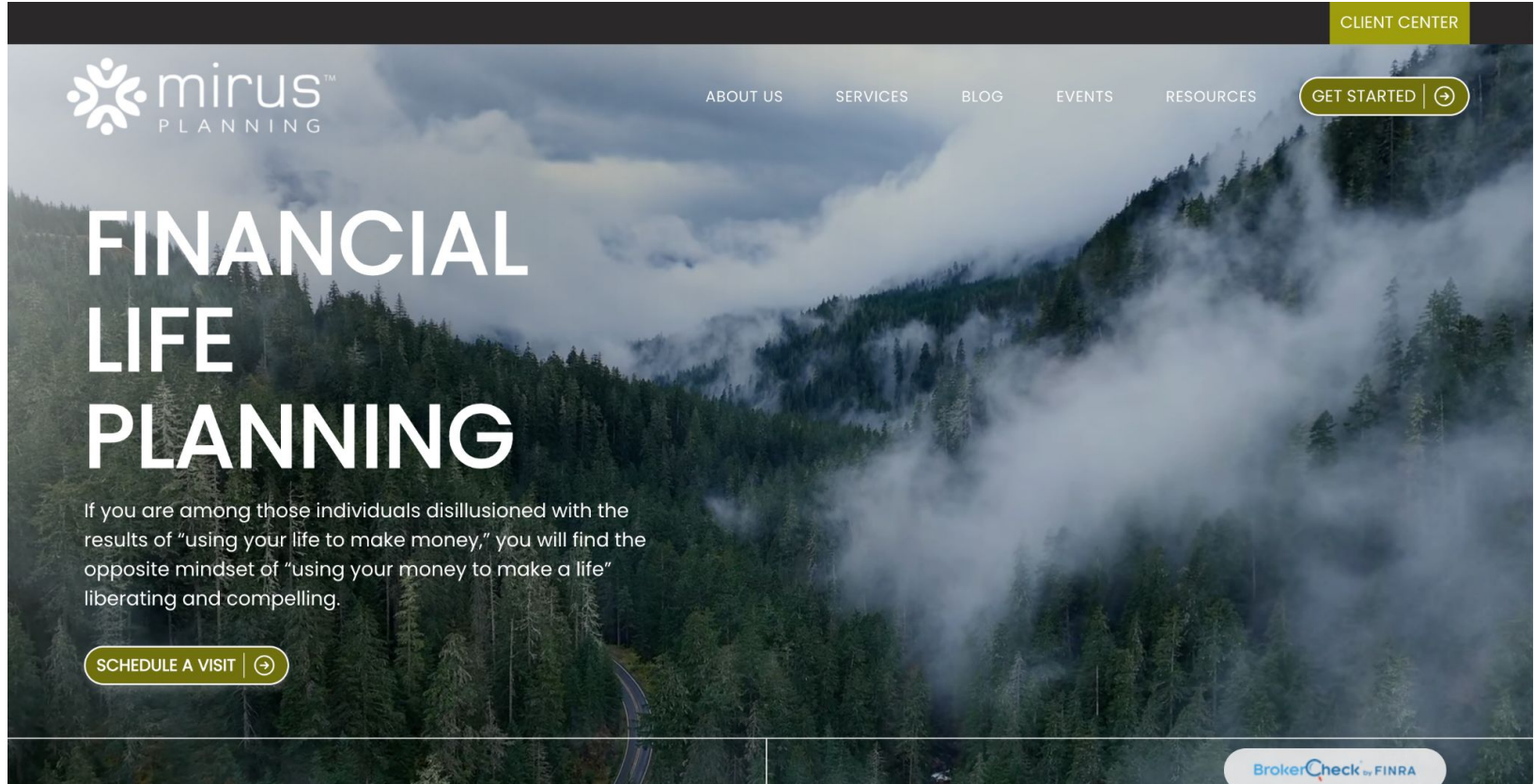
3. Make Sure Accounts Are Consolidated and Properly Titled

Having multiple accounts held at various financial institutions can complicate your estate strategy. Taking the time now to consolidate your financial accounts can help manage confusion and streamline asset distribution for your heirs. Maintaining many scattered accounts can create delays or can be overlooked by your loved ones. While going through the exercise of consolidating accounts, you may want to take the time to review how the assets are titled.

BrokerCheck by FINRA



Chad's Firm Website




Doug's Social Posts

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1w • Edited • 🌐

Life's full of firsts. In this case it was the first time 🐾 Annabelle experienced the pool! 🌊

Much thanks, appreciation, and respect 🙏 for all who have served our country. 🇺🇸
Happy Memorial Day! 😊


#memorialdayweekend
#firsttime
#armedforces



Veronika Saparova and 25 others

5 comments

Reactions




Douglas Howes • 2nd
20 Year Anniversary - Gratefull...
3w • 🌐

BUCKET 📋 LIST Destination ✅
Savannah, GA here we come. 🚗 What's on your bucket list?

22 9 comments

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Jenn McGroary • 2nd
Marketing & Brand Specialist • WebsiteGoT...
3w ...

Bucket List Destinations: Italy, Western US states - Grand Canyon, etc.

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Marketing & Brand Specialist • Websi...
3w ...

Yes, Rob has mentioned the helicopter rides too. :-)

Like • 1 | Reply

Katie Husson • 3rd+
3w ...

Hawaii. Any island.

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with Cheryl Howes

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5mo • 🌐

🔥 As the year winds down, here are 7 year-end tax ideas to consider:

- 📋 Check your retirement contributions to your 401(k), IRA, and HSA limits. Are you hitting the limits?
- 📋 Charitable giving: Have you considered donating appreciated securities and other options?
- 📋 Investment portfolio review: Talk with your financial professional about any rebalancing that may be needed and if there are any tax-loss harvesting opportunities. This post is not a replacement for real-life advice. Consult your tax, legal, and accounting professionals before modifying your tax strategy. ...more

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ARE THESE 7 YEAR-END TAX IDEAS ON YOUR TO-DO LIST?

- ✓ Maximize retirement contributions (401(k), IRA, HSA)
- ✓ Charitable giving
- ✓ Investment portfolio review
- ✓ Review estimated tax payments for business owners

- ✓ Estate management check-up
- ✓ Roth conversion opportunities
- ✓ Review required minimum distributions (RMDs)

Chad's Social Posts



Chad Parmenter · 2nd
Founder, Lead Wealth Planner at Mirus Planning
3mo · 🌐

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💡 For many, this is annual bonus payment season. What are your plans for this year's bonus?

Before you start considering your home improvement projects, vacations, or other splurges, any time you receive a lump sum of money, it's worthwhile to think about the following:

👉 Step 1: Pay Off High-Interest Debt

Tackle credit card balances first—knocking out high-interest debt can help you manage those costly payments.

👉 Step 2: Boost Your Emergency Fund

If you haven't already, set aside 3-6 months of expenses to help pay for unexpected events.

👉 Step 3: Grow Your Wealth

Evaluate your strategy with tax-advantaged retirement accounts. A financial professional can offer some guidance if you have questions.

👉 Step 4: Balance Multiple Goals

Not sure where to start? One idea to consider is splitting your windfall. For example:

- 50% to debt repayment
- 30% to savings
- 20% to long-term investments

💡 Every dollar you manage intentionally today may improve the outlook for your financial future. Don't waste these opportunities.

[#SmartMoney](#) [#WealthBuilding](#) [#DebtFree](#) [#FinancialGoals](#)
[#MoneyManagement](#)



Chad Parmenter · 2nd
Founder, Lead Wealth Planner at Mirus Planning
1mo · 🌐

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Hurricane Season Is Coming—Are You Prepared? 🌪️

Each year, hurricanes remind us how quickly life can be disrupted. National Hurricane Preparedness Week is a chance to check in on the plans that keep families, homes, and communities safe.

A few key steps to consider:

- ✓ **Know Your Risk:** Understand how hurricanes could impact your area, even if you don't live on the coast.
- ✓ **Have an Evacuation Plan:** Map out multiple routes and keep important documents easily accessible.
- ✓ **Review Insurance Coverage:** Standard homeowners policies don't always cover flood damage, so double-check your coverage to see what's included.
- ✓ **Build an Emergency Kit:** Food, water, medicine, and power sources can make all the difference in the days after a storm.

No one can control the weather, but preparation can make all the difference. What's one step you take to be hurricane-ready? Drop your tips in the comments! 💡

[#HurricanePreparedness](#) [#StaySafe](#) [#EmergencyManagement](#)



👤 Susan Theder and 1 other

1 comment

- 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**



Do It For Me Calendar

January 2025

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.

Calendar Key

E Email
 S Social media
 O Optional social media
 B Blog
 A FMG automation

Filter

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			B Innovative New Year... S Reimagining Resolu...	S Healthcare Premiu... S Focus on Life's Positi...		
S National Financial W...			A Monthly Market Insig...	S Are You Too Young fo...		O Cool Editing Tip
	S A \$172 Billion Mistake O National Dress Up 10					
	S Martin Luther King Jr... A Video of the Month					
	O International Haloba... S New Bill Increases So					

Recommended Content

Blogs

- [January 1: Innovative New Year's Resolutions: Financial and Personal Growth Strategies for 2025](#)
- [January 16: 10 Facts You May Not Know About Social Security](#)

Emails

- [January 2: Innovative New Year's Resolutions: Financial and Personal Growth Strategies for 2025 - Clients and Prospects](#)
- [January 2: Innovative New Year's Resolutions: Financial and Personal Growth Strategies for 2025 - CIOs](#)
- [January 16: 10 Surprising Facts You May Not Know About Social Security - Clients and Prospects](#)
- [January 16: 10 Surprising Facts You May Not Know About Social Security - CIOs](#)

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

Social Posts

January 2025 DIFM General Social Sequence

- [January 4: Focus on Life's Positive Moments](#)
- [January 18: Unlock the Full Power of Your Credit Card Points](#)
- [January 20: Martin Luther King Jr. Day](#)
- [January 23: What's Going on with Non-Competes](#)

January 2025 DIFM Financial Social Sequence

- [January 2: Reimagining Resolutions: Smart Financial Goals for 2025](#)
- [January 3: Healthcare Premiums Soar Even as Inflation Eases](#)
- [January 5: National Financial Wellness Month](#)
- [January 9: Are You Too Young for an Estate Strategy?](#)
- [January 13: A \\$172 Billion Mistake](#)
- [January 16: 10 Facts You May Not Know About Social Security](#)
- [January 26: New Bill Increases Social Security Death Benefit](#)
- [January 30: Top 5 Gen Z Financial Mistakes](#)

GIVEAWAY:

Summer Marketing Playbook

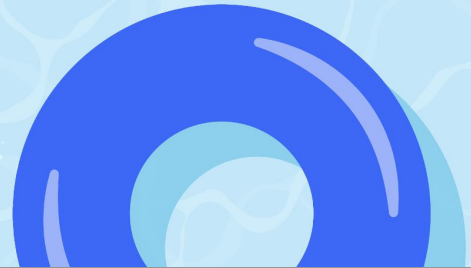


fmg



Your Summer Marketing Playbook: **Content That Converts**

Proven examples from our “Do It For Me” Program that financial advisors are using to drive engagement and open doors with prospects this season



Want to learn more?

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com

