



LIVE WORKSHOP:

# Converting Tax Conversations into **Business Growth**



# Tax Opps Email Template

## **Subject: Are You Making The Most of The Insights Within Your Tax Return?**

Your tax return is more than just numbers—it's a roadmap to smarter financial decisions.

Every tax return is unique, offering insights into how effectively your financial strategy is working for you. A professional review can uncover opportunities to optimize taxes, investments, and long-term planning.

### What Can a Tax Return Review Reveal?

#### ✔ Are your investments tax-efficient?

Your tax return can help us assess whether your investment strategy is aligned with minimizing unnecessary tax exposure.

#### ✔ Are there missed planning opportunities?

We'll look for ways to enhance your tax strategy, including:

- Tax-efficient retirement savings options
- Charitable giving strategies
- Capital gains management
- Roth IRA conversion opportunities
- Tax credit eligibility

#### ✔ Is your retirement withdrawal strategy optimized?

The way you take distributions from your accounts can significantly impact your tax bill. We'll help you evaluate smarter ways to withdraw income.

#### ✔ Are you diversifying your income tax efficiently?

We can help ensure you're balancing taxable, tax-deferred, and tax-free income sources in a way that maximizes efficiency.

#### ✔ What changes might impact your future tax bill?

We can run projections to help you make informed decisions before tax laws or your personal situation change.

If you'd like to schedule a time to review your tax return and explore potential planning opportunities, we'd be happy to meet.



# 01

## How to Include Messaging About Taxes: On Your Website

# Highlight The Benefits to Clients right on Your Website

## Strategic Tax Planning

We understand that strategic tax planning is crucial for both individuals and businesses. Taxes are often the largest expense, and not addressing them effectively is a missed opportunity to grow your wealth. We're here to help minimize tax liabilities while maximizing savings and financial opportunities.

### Benefits Include:

**MAXIMIZED SAVINGS** Our strategic tax planning uncovers deductions, credits, and opportunities that ensure you retain more of your wealth.

**IMPROVED CASH FLOW** By reducing your tax liabilities, we help you free up cash for investments, savings, or personal use.

**TAX EFFICIENT TAX PLANNING** We work to maximize retirement contributions and minimize taxes on withdrawals, giving you a more comfortable and secure retirement.

**INCREASED CHARITABLE GIVING** We help you create a thoughtful approach to charitable giving, maximizing your deductions while increasing your contributions without affecting cash flow.

**OPTIMIZED INVESTMENTS** Our tax efficient investment strategies are designed to enhance your returns while reducing, deferring, or even eliminating taxation, keeping more of your earnings working for you.

**BUSINESS STRUCTURE OPTIMIZATION** We analyze your business structure and advise on the most tax efficient options, whether LLC, S-Corp, or others, helping you achieve maximum tax leverage.





# holistiplan

Holistiplan

Holistiplan is a tax planning softw



## 2024 - 2025 Tax Season At-A-Glance

Tax Rates, Contribution Limits, and Other Important Data to help you with your 2024 and 2025 tax planning & submissions.

[DOWNLOAD HERE](#)



## 2025 Tax Year IRS Tax & Retirement Contribution Guide

**Source:**

<https://www.ariseprivatewealth.com/tax-planning-resources>

# Highlight How the Tech Benefits Clients right on Your Website



Source: <https://www.educoadvgrp.com/holistiplan>



Intro to HoliStiPlan

Peter and Paula Professor (1).pdf

Page 1 of 34

Watch later Share

Holdings Settings Contact Support Live Office Hours

Help Administration Jake Cuthbert

Scenario Analysis View Tax Return Print Report

Layout

**Form 1040** Department of the Treasury—Internal Revenue Service (99) **2021** OMB No. 1545-0047 IRS Use Only—Do not write or staple in this space.

**U.S. Individual Income Tax Return**

**Filing Status** ☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying widow(er) (QW)  
Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent ▶

Your first name and middle initial **PETER** Last name **PROFESSOR** Your social security number **111 11 1111**  
If joint return, spouse's first name and middle initial **PAULA** Last name **PROFESSOR** Spouse's social security number **222 22 2222**

Home address (number and street). If you have a P.O. box, see instructions. **123 FANTASTIC AVENUE** Apt. no. **222 22 2222**  
City, town, or post office. If you have a foreign address, also complete spaces below. State **TX** ZIP code **79409** Presidential Election Campaign  
**LUBBOCK** Foreign country name Foreign province/state/country Foreign postal code Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.  
☐ You ☐ Spouse

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? ☐ Yes ☒ No

**Standard Deduction** ☐ Spouse itemizes on a separate return or you were a dual-status alien

**Someone can claim:** ☐ You as a dependent ☐ Your spouse as a dependent

**Age/Blindness** You: ☐ Were born before January 2, 1957 ☐ Are blind Spouse: ☐ Was born before January 2, 1957 ☐ Is blind

**Dependents** (see instructions): (i) First name Last name (ii) Social security number (iii) Relationship to you (iv) ☒ If qualifies for (see instructions): Child tax credit Credit for other dependents

If more than four dependents, see instructions and check here ▶

<b>BART PROFESSOR</b>	<b>123 45 6789</b>	<b>SON</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>LISA PROFESSOR</b>	<b>987 65 4321</b>	<b>DAUGHTER</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Attach** **Sch. B** if required.

<b>1</b> Wages, salaries, tips, etc. Attach Form(s) W-2	<b>2a</b> Tax-exempt interest	<b>1</b> <b>300,000.</b>
<b>3a</b> Qualified dividends	<b>3a</b> <b>11,500.</b>	<b>2b</b> Taxable interest
<b>4a</b> IRA distributions	<b>4a</b> <b>25,000.</b>	<b>3b</b> Ordinary dividends
<b>5a</b> Pensions and annuities	<b>5a</b>	<b>4b</b> Taxable amount
<b>6a</b> Social security benefits	<b>6a</b>	<b>5b</b> Taxable amount
<b>7</b> Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ <input type="checkbox"/>	<b>7</b> <b>31,500.</b>	<b>6b</b> Taxable amount
<b>8</b> Other income from Schedule 1, line 10	<b>8</b> <b>40,450.</b>	<b>9</b> <b>403,950.</b>
<b>9</b> Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income ▶	<b>10</b> <b>4,858.</b>	<b>11</b> <b>399,092.</b>
<b>10</b> Adjustments to income from Schedule 1, line 26	<b>11</b> <b>399,092.</b>	<b>12a</b> <b>32,500.</b>
<b>11</b> Subtract line 10 from line 9. This is your adjusted gross income ▶	<b>12b</b> <b>0.</b>	<b>12c</b> <b>32,500.</b>
<b>12a</b> Standard deduction or itemized deductions (from Schedule A)	<b>13</b> <b>4,752.</b>	
<b>b</b> Charitable contributions if you take the standard deduction (see instructions)		
<b>c</b> Add lines 12a and 12b		
<b>13</b> Qualified business income deduction from Form 8995 or Form 8995-A		

**Standard Deduction for—**  
• Single or Married filing separately, \$12,550  
• Married filing jointly or Qualifying widow(er), \$25,100  
• Head of household, \$18,800  
• If you checked any box under

**JUSTED GROSS INCOME TIERS**

	Limits	Over/Under?
me Tax	\$250k	Over
n	\$190k - \$220k	Over
edit	\$198k - \$208k	Over
it Deduction	\$160k - \$180k	Over
	\$140k - \$170k	Over

0:29 / 2:27

YouTube

# Don't forget to capture leads!

Nitrogen + hol/stiplan

The screenshot shows the Thrive Financial Planning website with a dark background. At the top left is a logo of a tree with the word 'THRIVE' below it. At the top right is 'CONTACT INFO:' followed by an address, phone number, and email. Below this is a 'Client Login' button and social media icons for Facebook, Twitter, and LinkedIn. A large, semi-transparent modal window is centered on the page. It has a title 'LEARN HOW TO AVOID THESE 6 COMMON TAX ERRORS' and a paragraph of text. Below the text are three input fields labeled 'First Name', 'Last Name', and 'Email'. A 'GET EBOOK' button is at the bottom of the modal. In the background, a hand is holding a tablet displaying the same ebook cover. At the bottom of the page, there is a 'CFA' logo and a section titled 'GET FINANCIAL NEWS & UPDATES DELIVERED TO YOUR INBOX' with a 'Name' input field.

**CONTACT INFO:**

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

Client Login f t in

**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**

Name



The screenshot displays the FMG software interface with a sidebar on the left containing navigation options: Blog, Automate, Email, Social, Events, SETTINGS, Profile, Contacts, EXTRAS, and Help. The main window shows an email sequence editor for a prospect named Russell. The title is "Prospects Only - Thank You For Downloading 'Common Tax Errors'" with a "2 Emails" badge. Below the title, it states: "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."

The editor includes a left sidebar with the following sections:

- Type:** Email Sequence
- Author:** Do It For Me
- Keywords:** Clients, Email, Finance, Goals, Insights, Management, Relationships, Solutions, Strategies, Taxation, Wealth

The main content area shows the email text:

**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

At the bottom of the editor, there are "Close" and "Use Sequence" buttons, and a chat icon in the bottom right corner.

# 02

## How to Include Messaging About Taxes: In Emails

# Let Clients Know You Incorporate Tax Planning with an Email Campaign

ASK US ABOUT

## TAX PLANNING!

We are **excited** to offer **tax planning** as part of our comprehensive **financial planning service**.



# Let Prospects Know You Incorporate Tax Planning with an Email Campaign

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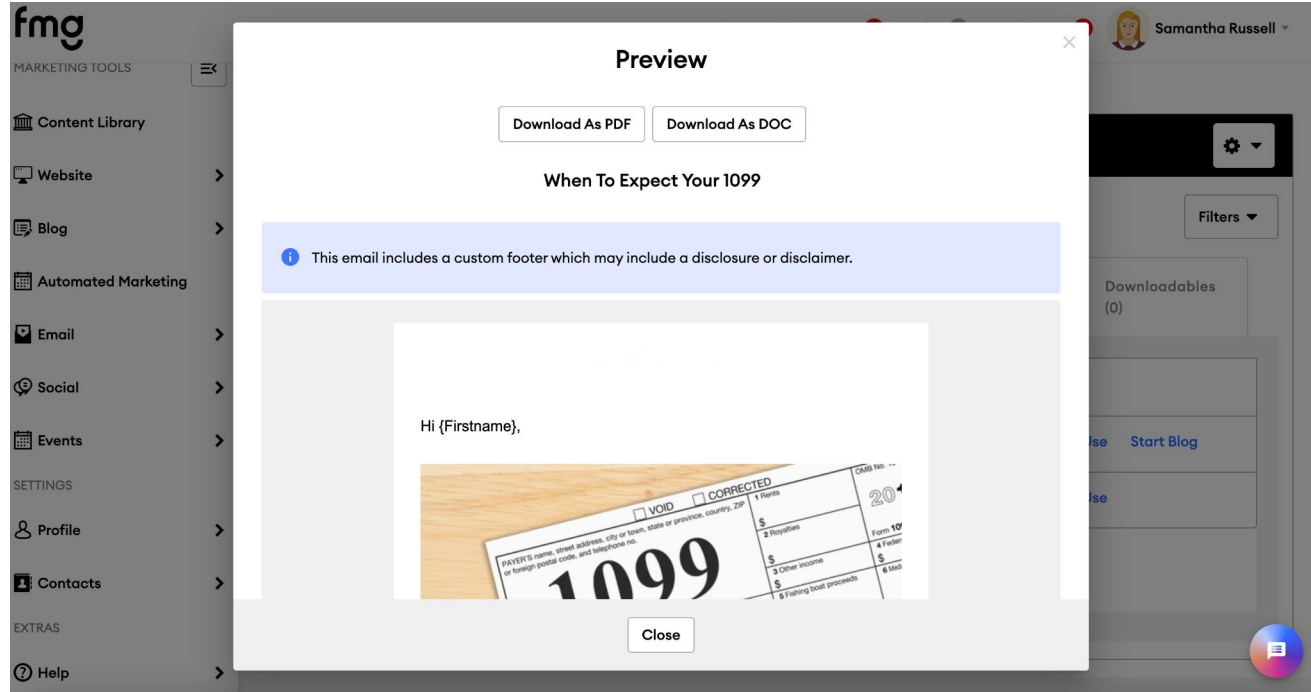
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If you'd like to schedule a time to review your tax return and explore potential planning opportunities, we'd be happy to meet.

One of  
**The most  
popular  
emails**  
This year!



Source: FMG's "Do It For Me" Exclusive Content Collection

# 03

How to Include Messaging About Taxes:  
On Social Media



**Jeff Hurst, CPA** · 2nd  
President at Hurst Financial Consulting LLC

Follow ...

Do you think your tax rate will be higher in the future?

Look at this chart by YCharts showing the historical tax rates for the lowest and highest tax brackets.

For the highest bracket, the historical average (not the high) is 57.69%, although we are currently at 37%.

Some believe that taxes may increase in the future. Here are the facts:

- Higher tax rates may be part of any proposed solution to the current U.S. deficit.
- The time to manage your taxes is when you understand the current rates.

Every person's situation is unique, but as we approach year-end, a Roth IRA conversion for a portion of your retirement portfolio may be a strategy to explore a bit more.

A Roth IRA must meet a 5-year holding rule and occur after age 59 ½ for the tax-free and penalty-free withdrawal of earnings. Tax-free and penalty-free withdrawals can also be taken under certain circumstances, such as the owner's death. The original Roth IRA owner is not required to take minimum annual withdrawals.

This post is for informational purposes only and is not a replacement for real-life advice, so make sure to consult a tax professional before moving forward.

[#RothConversion](#) [#RothIRA](#)

■ US Individual Income Tax: Tax Rates for Regular Tax: Highest Bracket  
■ US Individual Income Tax: Tax Rates for Regular Tax: Lowest Bracket

Year	Highest Bracket Rate (%)	Lowest Bracket Rate (%)
1920	~15	~1
1940	~60	~10
1960	~70	~15
1980	~50	~10
2000	~35	~10
2020	37	10
<b>Historical Average</b>	<b>57.69%</b>	<b>11.81%</b>



**Arise Private Wealth**

550 followers

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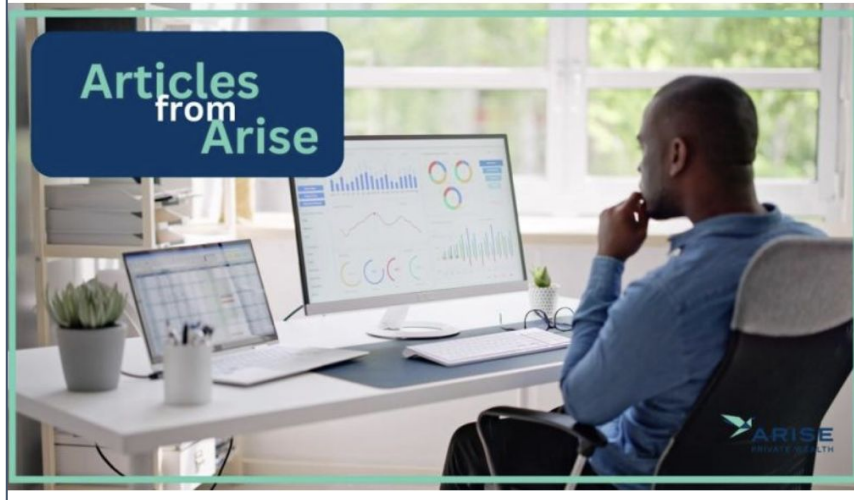
+ Follow ...

### How to File Taxes the First Year After Divorce

Tax filing after divorce requires understanding new filing statuses, exemptions, child deductions, alimony, property settlements, etc. Here are the steps to help navigate filing taxes the first year after divorce.

Read Here: <https://lnkd.in/gGK4J9eq>

#ArisePW #SouthBay #PalosVerdes #FinancialAdvisor #FinancialPlanner  
#Divorce #Taxes



**Source:**

**<https://www.ariseprivatewealth.com/tax-planning-resources>**



**Dave Zoller, CFP®** • 1st

Join 100,000 For This Week's Retirement Strategy Video ♦ Owner of Str...  
4yr •

There are 3 big ways to "Pay Less Tax on [Investment](#) Gains"

Here's the first of the three.  
Tax Loss Harvesting

If it is done correctly, you can

- reduce your highly taxed ordinary income,
- increase your after-tax returns in those taxable accounts and
- stay invested the whole time.

[#taxes](#) [#investing](#)



19

7 comments



**Dave Zoller** • 1st

Tax Reduction Consultant for Biz Owners | Retirement Advisor | CERTIFIE...  
4mo •

"CAN I DEDUCT GOLFING 🏌️🇺🇸 IF I DISCUSS BUSINESS?"

The temperature was in the 40s and 50s a few days this past week in the Chicago area.

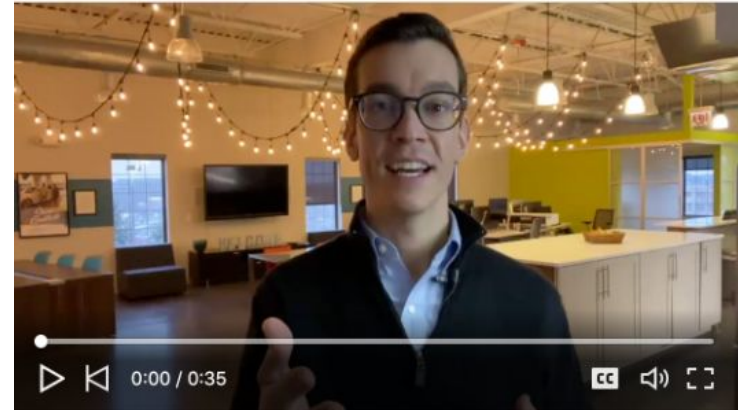
That means people were out on the golf course.

And some of them wanted to know what they can write off on their taxes.

Here's a short video on what you can and cannot deduct.

🇺🇸 In the comments, tag a golfing buddy you can discuss business with while you're out on the course.

[#golf](#) [#davezoller](#) [#taxes](#)

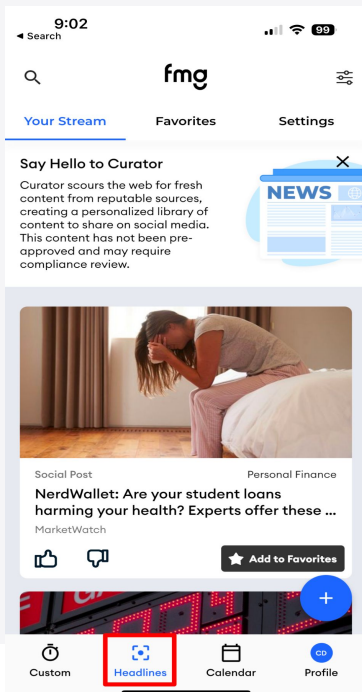


46 • 41 Comments • 1,728 Views

Source: [Dave Zoller on LinkedIn](#)

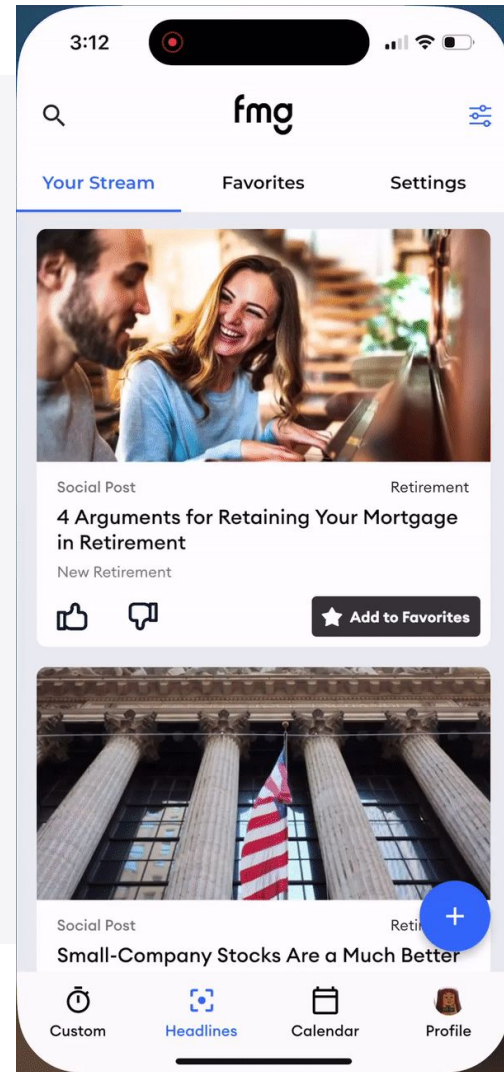
# AI Generated Captions in FMG Mobile App!

## 1. Browse and Choose Your Content

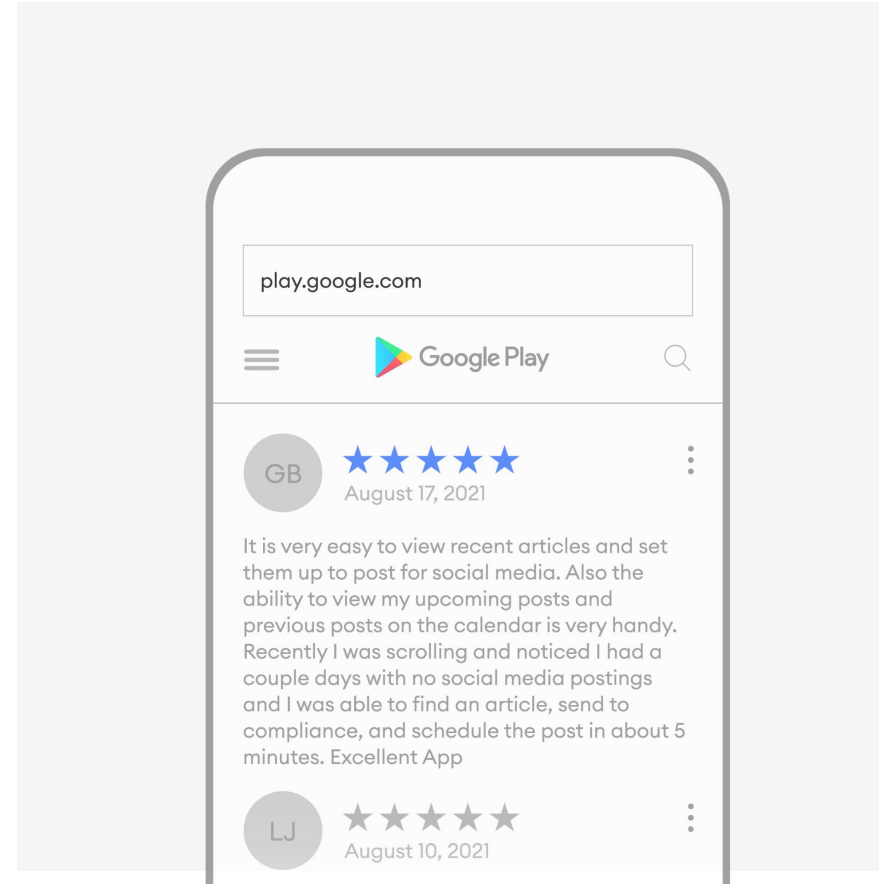


## 2. Add Your Caption

- Write Your Own Text
- Write Text For Me



# Download the FMG App:



# 04

## How to Include Messaging About Taxes: Via Events



# Events: Generate leads (Use LinkedIn!)

## Over last 18-24 months:

- 1,000 people registered
- 40% attended
- 8-10% reached out

## Results:

- Generated 9 new client households
- \$11 Million AUM
- \$12,000 ad spend

First webinar ONLY had 10 people on it!



 Tuesday, April 4, 2023 @ 12pm PT



**5 Hidden Tax Strategies for Microsoft Employees**



Presented by  
**Isaac Presley, CFA®**  
CEO, Cordant Wealth

- How to take advantage of recent tax changes
- 5 hidden strategies to help reduce your tax bill
- How to avoid common tax planning mistakes

**Event ended**

**5 Hidden Tax Strategies for Microsoft Employees**

Event by Cordant Wealth Partners

 Tue, Apr 4, 2023, 3:00 PM - 3:45 PM (your local time)

 Online

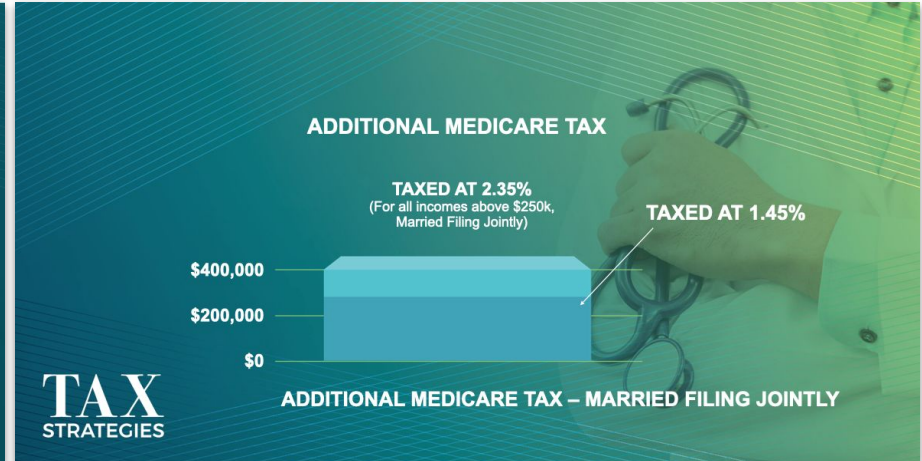
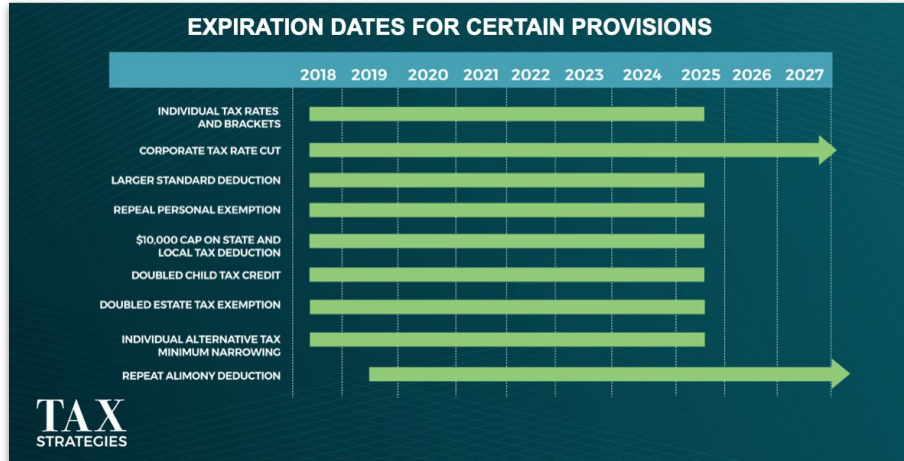
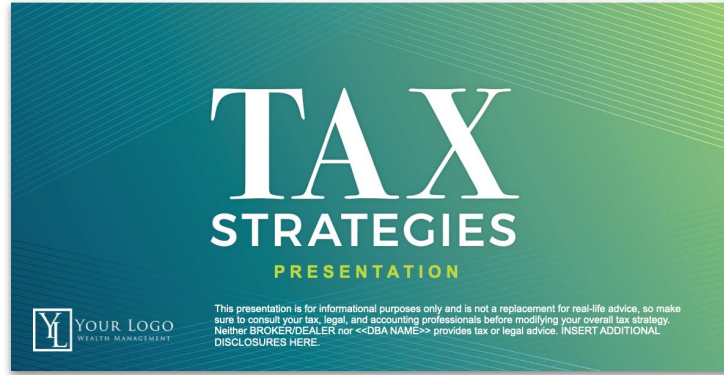
 Event link · [https://us02web.zoom.us/webinar/register/WN\\_q3Ow2rOEQrWTigJFCdwKiA](https://us02web.zoom.us/webinar/register/WN_q3Ow2rOEQrWTigJFCdwKiA)

 Isaac Presley and 136 other attendees

[Share](#) 

Source: <https://altruist.com/podcasts/the-unexpected-tool-that-led-to-millions-in-aum-with-isaac-presley/>

# FMG Creates Webinar Slides & Assets For You



# Tax Planning & Retirement: Claiming Medicare

Medicare eligibility starts at age 65, but you can begin the filing process up to three months prior to your 65th birthday.

## Can I wait to file?

You can, but doing so could potentially result in late enrollment penalties, which can be costly and last for a very long time. That's why it's usually better to begin the process of filing for Medicare as soon as you're eligible. The possible exception is if you continue to receive health insurance through an employer, though if that applies to you, we should examine your health insurance benefits to see if you're required to apply to have Medicare be your primary coverage.

## What is Medicare?

Medicare is broken out into a handful of parts, some of which are optional:

### Part A

- Covers hospitals
- Generally free to most people

### Part B

- Covers doctors, medical care, etc.
- Monthly premium, paid out of pocket or withheld from Social Security benefits

### Part D

- Prescription drug coverage
- Monthly premium, paid out of pocket or withheld from Social Security benefits
- Optional; should be reviewed annually

### Medigap

- Covers elements that Part B does not
- Referred to using letters (e.g., Plan A-Plan J)
- Differ in terms of coverage and cost



## What Happened to Part C?

Some folks elect to forego traditional Medicare and instead use Medicare Advantage Plans ("Part C").

The decision to use a Medicare Advantage Plan instead of traditional Medicare can be complicated and should be approached with the appropriate amount of analysis and discussion.

You can begin the enrollment process for Basic Medicare (Parts A and B) at [Medicare.gov](https://www.medicare.gov). We can talk about your options for Part D and Medigap either together or with the help of an expert.

# Tax Planning & Retirement: Required Minimum Distributions

## Contributions

Typically pre-tax

## Withdrawals

Typically taxed as ordinary income at the taxpayer's marginal rate

One benefit of traditional Individual Retirement Accounts (IRAs) and 401ks is their

## Growth

tax-deferred: no tax on interest, dividends, &

## Tax De

At some withdra referred (RMD), traditio ordin

## When d

For mar started, turned 7 with the SECURE 2.0 Act

Folks w take on IRAs th

# Holistiplan Marketing Toolkit

visors e. This larger future even growth.



## How much is my RMD going to be?

The RMD is calculated by dividing the account balance as of December 31st in the year before the distribution by a number in an IRS-provided table that's associated with how old the account owner will be in the year of the distribution.

## What if I Don't Take My RMD?

Prior to the passage of the SECURE 2.0 Act, account owners faced a stiff 50% penalty on the amount they should have withdrawn but failed to. The SECURE 2.0 Act reduced the penalty to 25% starting in 2023, which can be further reduced to 10% if the account owner withdraws the necessary amount and submits an amended tax return in a timely fashion.

# Advisor Cheat Sheet: RMDs

The amount of the RMD is arrived at by dividing the account balance as of December 31st in the year before the distribution by a number in an IRS-provided table (the "divisor") that's associated with how old the account owner will be in the year of the distribution. Most people will use the Uniform Lifetime Table, as shown here, to determine their divisor.

For example, an individual who turns 75 in the current year and had a prior-year IRA balance of \$500,000 would have an RMD of \$21,097 (\$500,000/23.7 = \$21,097)

Age of Retiree	Divisor	Age of Retiree	Divisor
73	26.5	97	7.8

# WHY TAX PLANNING MATTERS



Tax planning refers to our review of your tax return to identify potential planning opportunities - both now and in the future - to keep your lifetime tax liability as low as possible.

## WHAT IS TAX PLANNING?



## WHY IS TAX PLANNING IMPORTANT?

Taxes touch every part of your financial life. Your tax return is a financial fingerprint: it's completely unique to you, complete with valuable clues and information, all of which is buried in dozens of pages and hundreds of numbers. Understanding your return equips us to have more valuable and actionable conversations with you.

## WHO IS TAX PLANNING FOR?



Everyone! Regardless of your income sources or filing status, nearly anyone who pays income taxes can benefit from having a professional review of your tax return to identify relevant planning opportunities.

## WHAT KIND OF OPPORTUNITIES MIGHT BE IDENTIFIED?

We will evaluate topics like tax efficient retirement vehicles, charitable giving strategies, realizing capital gains, Roth IRA conversions, tax credit eligibility, and more. We can run projections to see how potential changes may impact your upcoming tax liability.

## WHAT DO WE NEED FROM YOU?

An electronic PDF copy of your most recent tax return. That's it!



# “What is Tax Planning” Email Template

**Subject:**

Turn Taxes Into A Financial Planning Opportunity!

**Body:**

We hope you're doing well! Today we want to share about a topic that has become very important to our office: income taxes. While we understand that taxes may not be the most exciting topic, they do present a fantastic opportunity for us to reassess and refine your overall financial strategy. By incorporating your tax situation into our overall approach, we can work together to help manage your tax liability. Some of the ways we leverage your tax returns in our overall process include the following:

- **Tax-Efficient Portfolio Management:** A thorough understanding of your tax situation puts me in a better position to understand your overall personal finances. That can allow us to discuss different approaches, which may lead to a more tax-efficient investment strategy.
- **Retirement Optimization:** Comprehensive knowledge of your tax situation allows me to better understand the role each of your retirement accounts plays in your overall financial strategy.
- **Tax-Sensitive Withdrawal Strategies:** Taxes are one factor to consider when withdrawing money from your accounts during retirement. I can show you illustrations so you can better visualize why tax management is a critical factor when making withdrawal decisions.
- **Coordination of Tax Strategies with Your CPA:** Having a clear understanding of your tax situation allows me to collaborate effectively with your certified public accountant (CPA). A well-structured financial strategy should take into account your tax situation as well as a variety of other factors.
- **Ongoing Tax Management:** Tax laws and regulations are constantly changing. By reviewing your tax returns periodically, I can show you potential adjustments in your financial strategy that may help address new laws and regulation.

Whether you filed in April or have an extension, at your convenience, upon completion of your returns, please call our office to arrange a time to review your tax returns together. Alternatively, we can provide you access to our secure portal, where you can safely upload your documents. Please remember not to email your tax returns directly.

Thank you for the trust you've placed in our team. We remain dedicated to helping you pursue your family's financial goals and are honored to be part of your journey.



# Follow Up Email Template

Tax Return Review Follow-Up Email Template

Subject: Thank you for submitting your [YEAR] tax return!

Body:

[CLIENT(S) NAME]

Thank you for submitting your tax return documents! Reviewing your tax return will enable us to better determine what tax strategies are best for you and your family in the years to come.

We would now like to schedule some time with you to discuss both what we saw after reviewing your tax return and what strategies may be available this year and beyond. Please use the link below to book some time with us!

[INSERT CALENDLY, ETC. LINK HERE]

To help prepare you for this meeting, here are some things to think about and discuss with your family ahead of time: **[ADD OR REMOVE ANY OF THESE TO FIT YOUR CLIENT'S NEEDS]**

- Do you or your spouse plan to have any career changes in the coming year that would result in significant changes in amount or type of salary?
- Do you plan to buy, sell, or renovate a home?
- Are any of your children headed off to college?
- Do you have any outside accounts not currently under our management that we need to consider for tax planning purposes?
- Do you plan to make charitable contributions similar to what you made last year?
- Do you have any other questions about your taxes that you would like to discuss?

Thank you again for this opportunity to reassess and refine your overall financial strategy. We can also share our tax planning strategies with **[INSERT TAX PREPARER]** so they can weigh in and are aware of the strategies implemented ahead of next filing season.

We're looking forward to meeting with you and discussing our findings in detail.



# Marketing Can Feel Hard

Hopefully this makes it a bit easier!

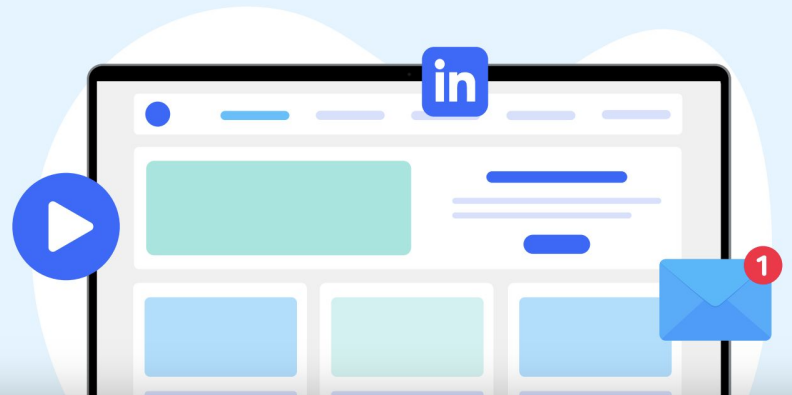
**Questions?**

**Want to learn more about FMG or Holistiplan?**

Email: [marketing@fmgsuite.com](mailto:marketing@fmgsuite.com)  
or [info@holistiplan.com](mailto:info@holistiplan.com)

fmg

## 2025 Marketing Guide for Financial Advisors





#### Marketing Tip

[Sip and Snip Event](#)

#### Podcast or Webinar Outline

[Financial Factors in College Decisions](#)

#### Video Script of the Month

[Financial Factors in College Decisions](#)



**Susan Theder**

CMO/CXO, FMG



**Samantha Russell**

Chief Evangelist, FMG

[for Families in the Final Stretch](#)

# “Do It For Me” Marketing Program



## Emails

[April 2: Spring Into Financial Wellness: Key Steps for Financial Literacy Month – Clients and Prospects](#)

[April 2: Financial Literacy Month: Supporting Our Mutual Clients' Financial Wellness – COIs](#)

[April 17: From College Acceptances to Affordability: Insights for Families in the Final Stretch – Clients and Prospects](#)

[April 17: From College Acceptances to Affordability: Considerations for Families in the Final Stretch – COIs](#)

## 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

### April 2025 DIFM General Social Sequence

[April 7: 30th Anniversary of National Public Health Week](#)

[April 22: Earth Day](#)

[April 23: Administrative Professionals Day](#)

### April 2025 DIFM Financial Social Sequence

[April 3: Spring Into Financial Wellness: Actionable Steps for Financial Literacy Month](#)

[April 5: Beef Up Your Password Security On 3 Key Accounts](#)

[April 9: Here's How Much Money Americans Think They Need to Be Rich](#)

[April 11: How To Launch A Successful Business In Retirement](#)

[April 15: What Tax Docs To Keep—And What To Shred](#)

[April 18: From College Acceptances to Affordability: Advice for Families in the Final Stretch](#)

[April 29: Do This For A Happy Retirement](#)



# 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](#).*



English



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				