



The Only 2 Marketing Moves Advisors Need Each Month in 2026

If you implement even one of these marketing moves per month, your business will look completely different by the end of 2026.

This isn't a list of 22 things you need to do all at once. It's a prioritized roadmap – two specific actions per month that consistently drive organic growth for financial advisors.

February → Foundation

1. Audit your audience

- If your feed is full of other advisors, you're doing social media wrong. At least 60% of your feed should be your target audience. Fix this first.

2. Pass the 5 Second test

- Get crystal clear on your niche. When someone visits your website, they should be able to identify who you work with and what you do within 5 seconds.
- If you try to speak to everyone, you resonate with no one. Clarity is a growth multiplier.

Use this framework: "I help [WHO] to [DO WHAT], so they can [2-3 BENEFITS]."

For example: "I help business owners plan their retirement, so they can breathe easy."

March → LinkedIn

1. Post content that keeps people ON LinkedIn

- Create zero-click content and teach directly in the post. Stop forcing people to "click to read." Give value upfront.
- The algorithm rewards content that doesn't force the reader to leave the platform, and it also gets WAY more comments.

2. Run the "Prime the Algorithm" routine

- 10 minutes before posting → leave thoughtful comments on 5-8 posts.
- This primes LinkedIn to show your post next and boosts reach significantly.

April → Video

1. Start every video with a great hook

- Not “Hi, I’m Samantha,” but “We’ve been working with 60/70 yr olds for 15 years. If they could go back and give their 50 yr old self advice – this is what they’d say.”
- The first 5 seconds determine whether people stay or scroll.

2. Use natural light + your phone

- You don’t need fancy equipment. You need clear visuals, good energy, and a simple outline.
DON’T READ A SCRIPT!

May → Make AI Recommend You

1. Add “structured content” to your website

- AI tools don’t browse your website – they extract.
- They scan for clearly structured answers. The more you use questions + short paragraphs + bullets, the easier it is for AI systems to confidently cite or recommend you.

2. Get testimonial and add them to your website (text or video)

- Testimonials are one of the biggest credibility signals both AI and humans look for.

June → Email Marketing

1. Send at least 2 emails to prospects/clients per month

- One value-packed bi-weekly email keeps you top of mind like nothing else. Timely topics always perform well.

2. Write subject lines like headlines

- Curiosity and clarity beats “Monthly Newsletter” every time.

July → Events

1. Plan a summer or fall event that people WANT to attend

- Less than 20% of advisors use prospect events to grow.
Try these:
 - Hire a photographer for a family picture day
 - Invite an expert to join you to discuss AI Scams targeting the elderly
- Events deepen relationships fast.

2. Turn webinar events into 10+ content pieces

- Short video clips, recap posts, emails, reels, quotes, FAQs – create a system to repurpose the momentum.

August → Website Optimization

1. Ensure you have audience-focused messaging

- Focus copy on your clients' perspectives. Replace "We" statements with "You" language that speaks directly to your prospects' desires and challenges.
- **For example:** Change "We provide retirement services" to "Your trusted resource for achieving retirement goals."

2. Optimize your website navigation bar

- You should have no more than 5 main pages, with special emphasis on the 3 most visited sections: **Home, About/Team, and Contact/Get Started.**
- Keep it simple and easy to navigate

September → Social Proof & Credibility

1. Add case studies or client success stories to your website

- Prospects want to see themselves in your current clients. Share specific examples of how you've helped people like them (without violating confidentiality).
- Use a simple format: Challenge → Solution → Result.

2. Collect and display testimonials

- Testimonials influence both AI recommendations and human trust. Ask 3–5 clients to leave a testimonial this month.
- Make it easy: send them a direct link and a short template they can customize.

October → Client Onboarding

1. Create a seamless onboarding process

- Map out every step a new client goes through from "yes" to their first meeting. Identify friction points and eliminate them.
- A smooth onboarding experience sets the tone for the entire relationship.

2. Build a welcome sequence for new clients

- Set up an automated 3–5 email series that welcomes new clients, explains what to expect, and answers common questions.
- This reduces anxiety and builds confidence in their decision to work with you.

November → Client Engagement

1. Send a personalized “check-in” to your top 20 clients

- Send a personalized message asking how they’re doing and if there’s anything on their mind.
- These conversations often lead to referrals or deeper relationships.

2. Host a client appreciation event (virtual or in-person)

- Thank your clients and strengthen relationships before the end of the year.
- Keep it simple: a coffee meetup, wine tasting, or virtual Q&A.

December → Year-End Strategy

1. Create a “Year in Review” email or video

- Share key financial updates, market insights, or planning reminders for 2027.
- Position yourself as the go-to advisor heading into the new year.

2. Offer a year-end planning session with the whole family

- Send an email to encourage family planning meetings with prospects or existing clients. It’s a low-pressure way to add value and connect with the next generation.

Ready to Let FMG Do the Heavy Lifting?

These 22 moves work – but we know you’re busy running your business.

FMG provides financial advisors with the tools, content, and technology to implement these strategies effortlessly. From website optimization to email campaigns to social media management, we help you execute – so you can focus on your clients.

Book your 20-minute consultation today and see how we can simplify your marketing while driving real results.

[Schedule Now](#)

