



	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
	LIVE WORKSHOP: If I Were Planning Your Month of Content, Here's Exactly What I'd Post WITH <i>Samantha Russell</i>			



Introducing



Samantha Russell

Chief Evangelist

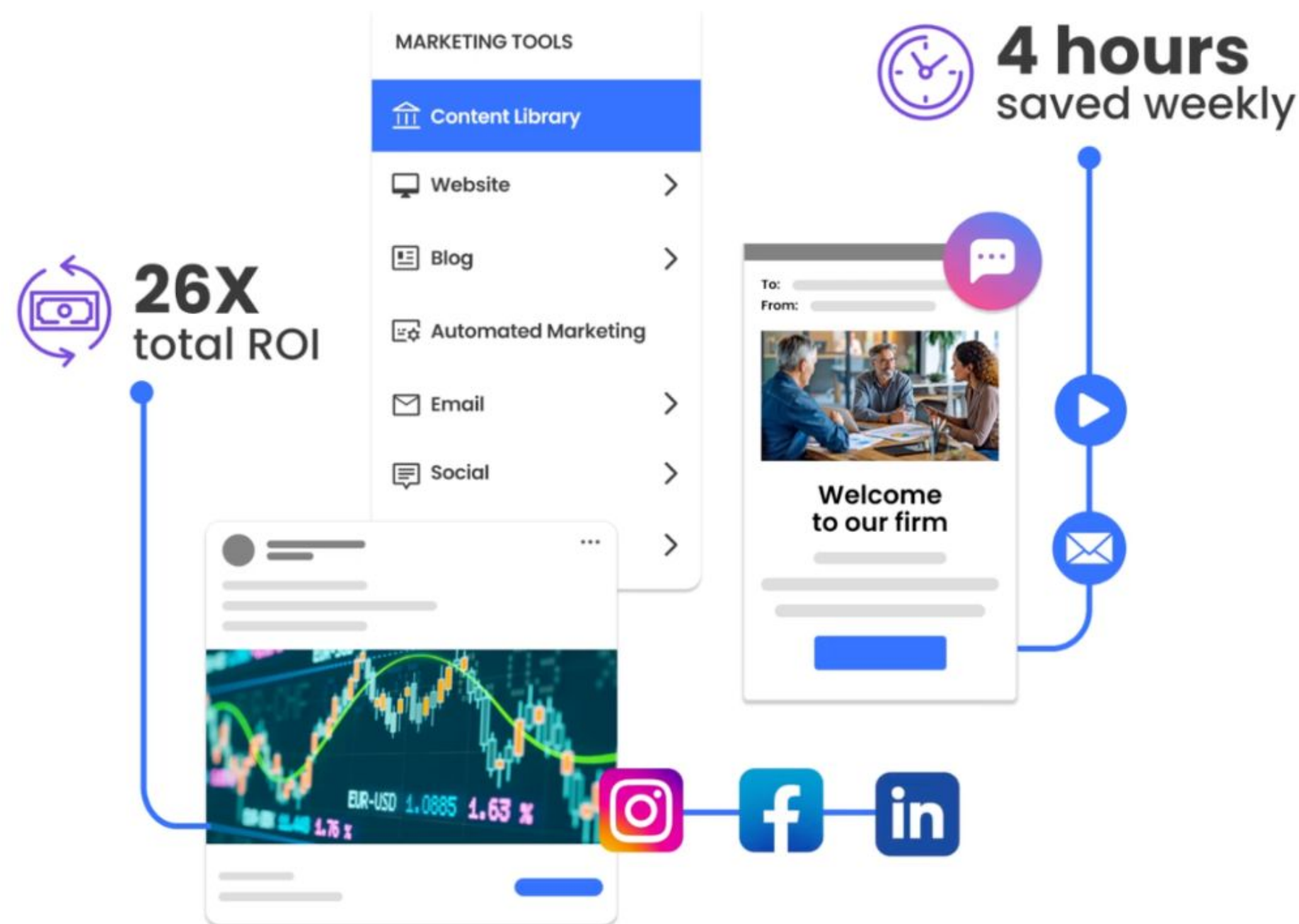
fmg



Your partner for what's next in advisor marketing.

FMG helps you keep pace with how clients discover and choose advisors, with the flexibility to build one connected platform or use only the solutions that fit your business.

See How it Works



One Platform For Every Part of Your Marketing

01	CONTENT & ENGAGEMENT Marketing Suite	Keeps you visible and consistent. Email, social, content, and automations, all compliance-ready.
02	DIGITAL PRESENCE Website Suite	The foundation. Where prospects validate, referrals land, and AI search surfaces your expertise.
03	CLIENT TEXTING Messaging Suite	Lets you text clients compliantly. Built for financial advisors, modern new mobile app.
04	MANAGED EXECUTION Do It For Me	Removes the execution burden. A dedicated Concierge runs marketing month after month.
05	TRUST & SIGNALS Testimonials	Compliant reviews and social proof, built into the platform and surfaced on websites and Google.
06	CONTENT MARKETPLACE Institutional Intelligence	Carrier, asset manager, and association expertise published in the your voice.
07	PARTNER PROGRAM FMG Connect	Integrates with all your preferred solutions saving you time and improving execution.



One login · Built in compliance workflow · CRM integrations · Built only for financial advisors

A few housekeeping notes

1

This session is being recorded

A replay will be available afterward if you need to step away or want to revisit it.

2

We'll share the slides

The presentation deck will be sent out along with the replay link.

3

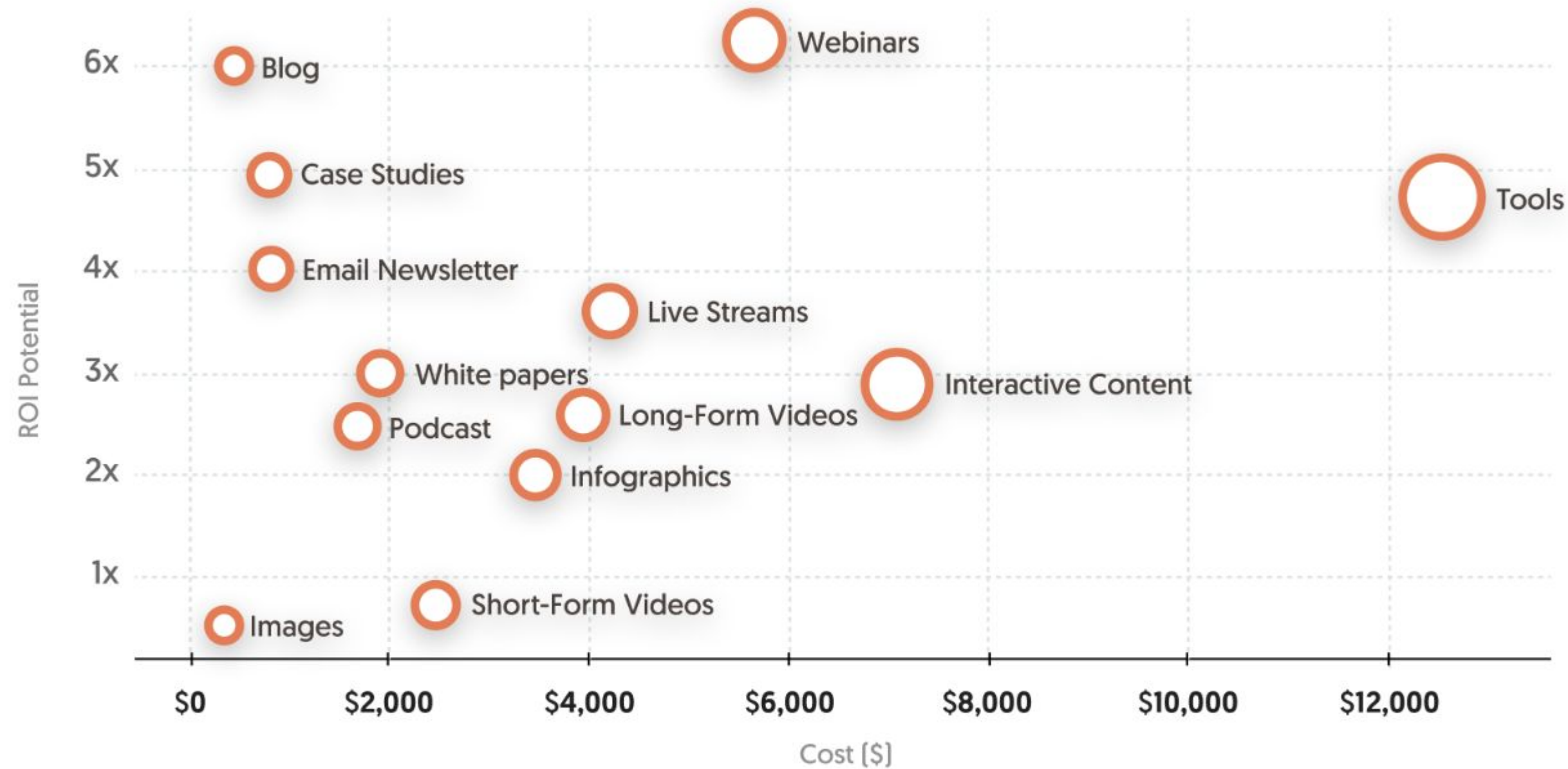
Plus a look at how FMG Can Help

We'll include an overview of FMG's "Do It For Me" solution for anyone who wants to explore it further.

1

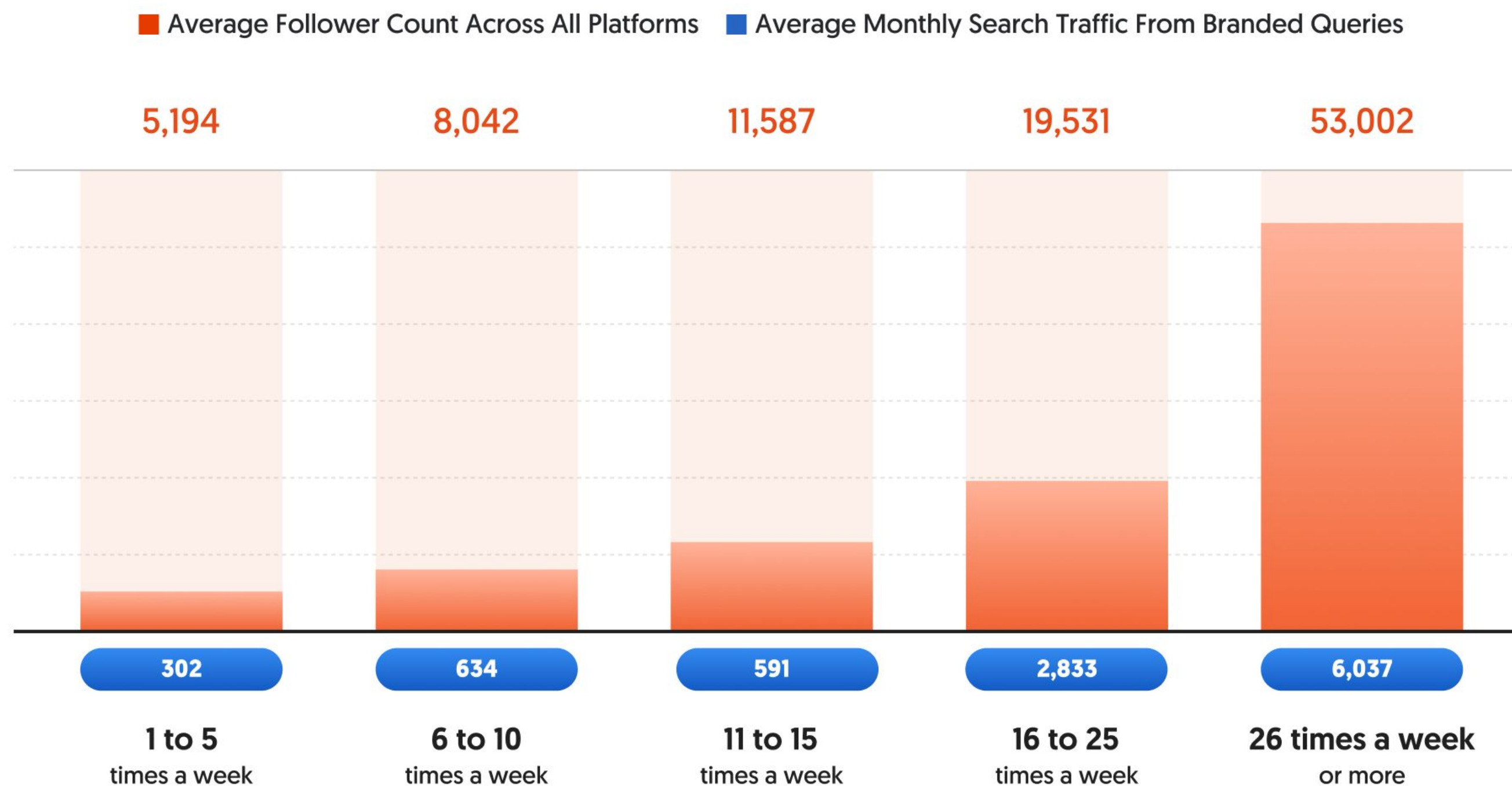
**Before we make can make a
strategic plan, we have to look at
the current landscape**

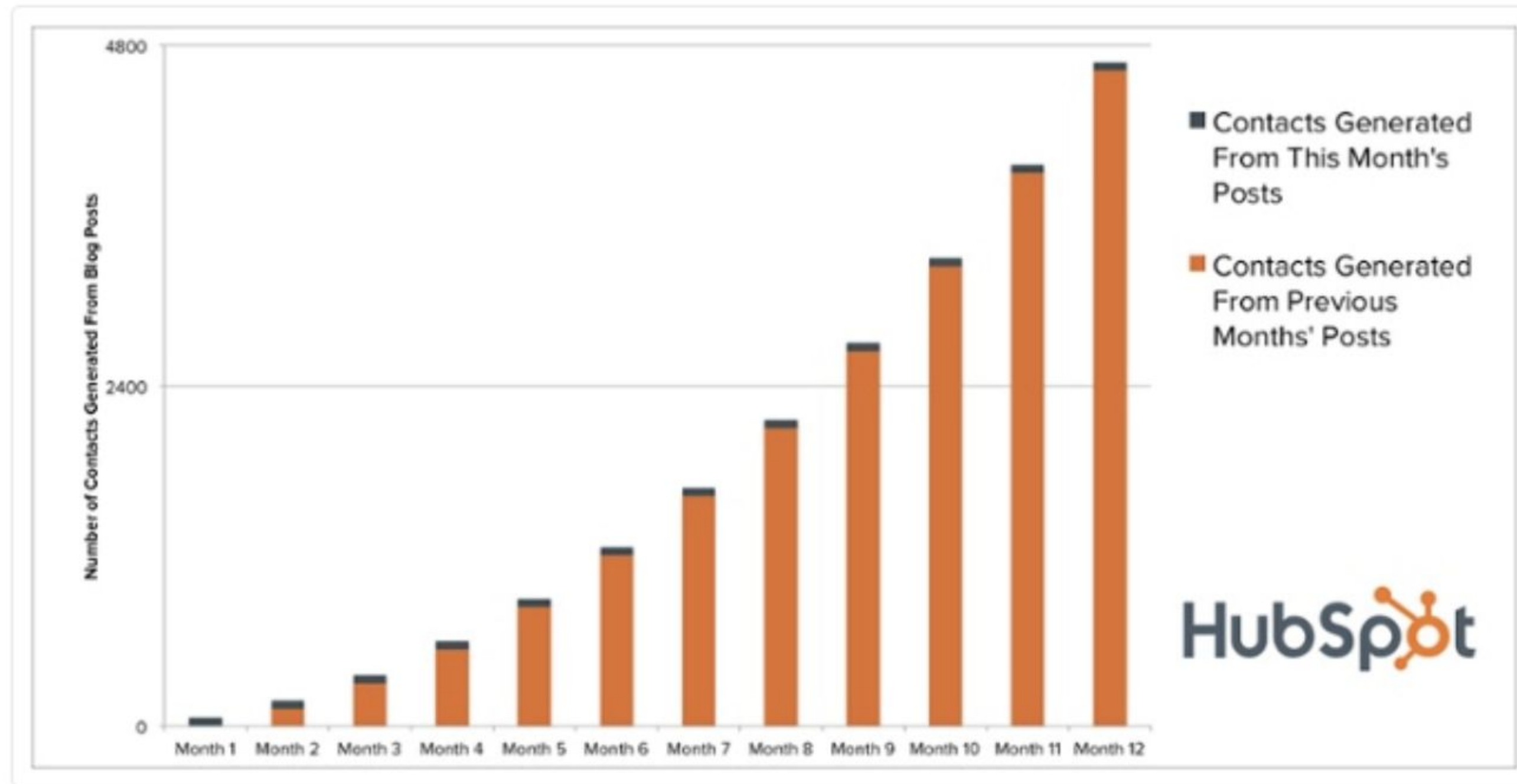
Content Marketing Tactics: Cost Vs. ROI Potential

**WHAT TO DO NEXT:**

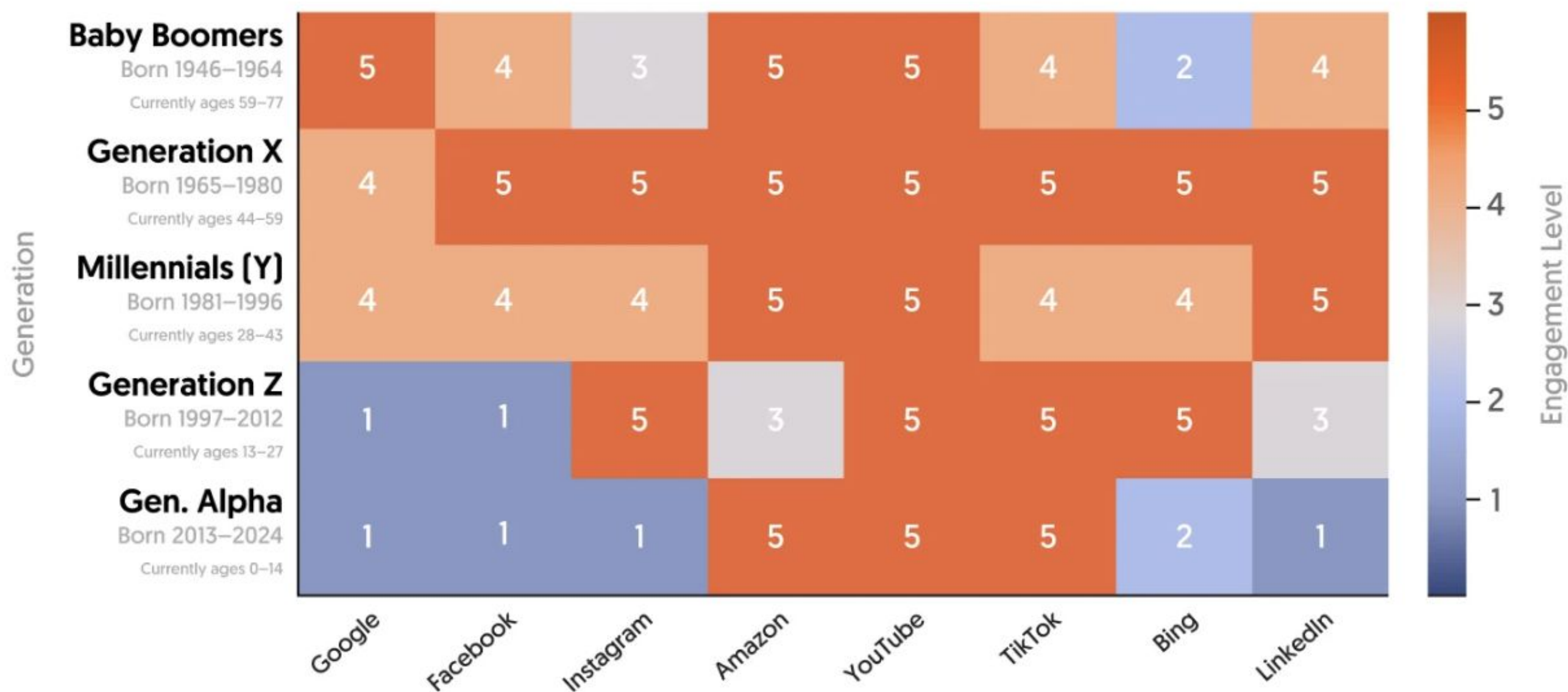
Invest in high-impact content like tools, webinars and interactive content — they don't just **inform**, they **convert** and generate **revenue**.

Does Publishing More Content Increase Followers And Brand Authority?





How Different Age Groups Engage With Content



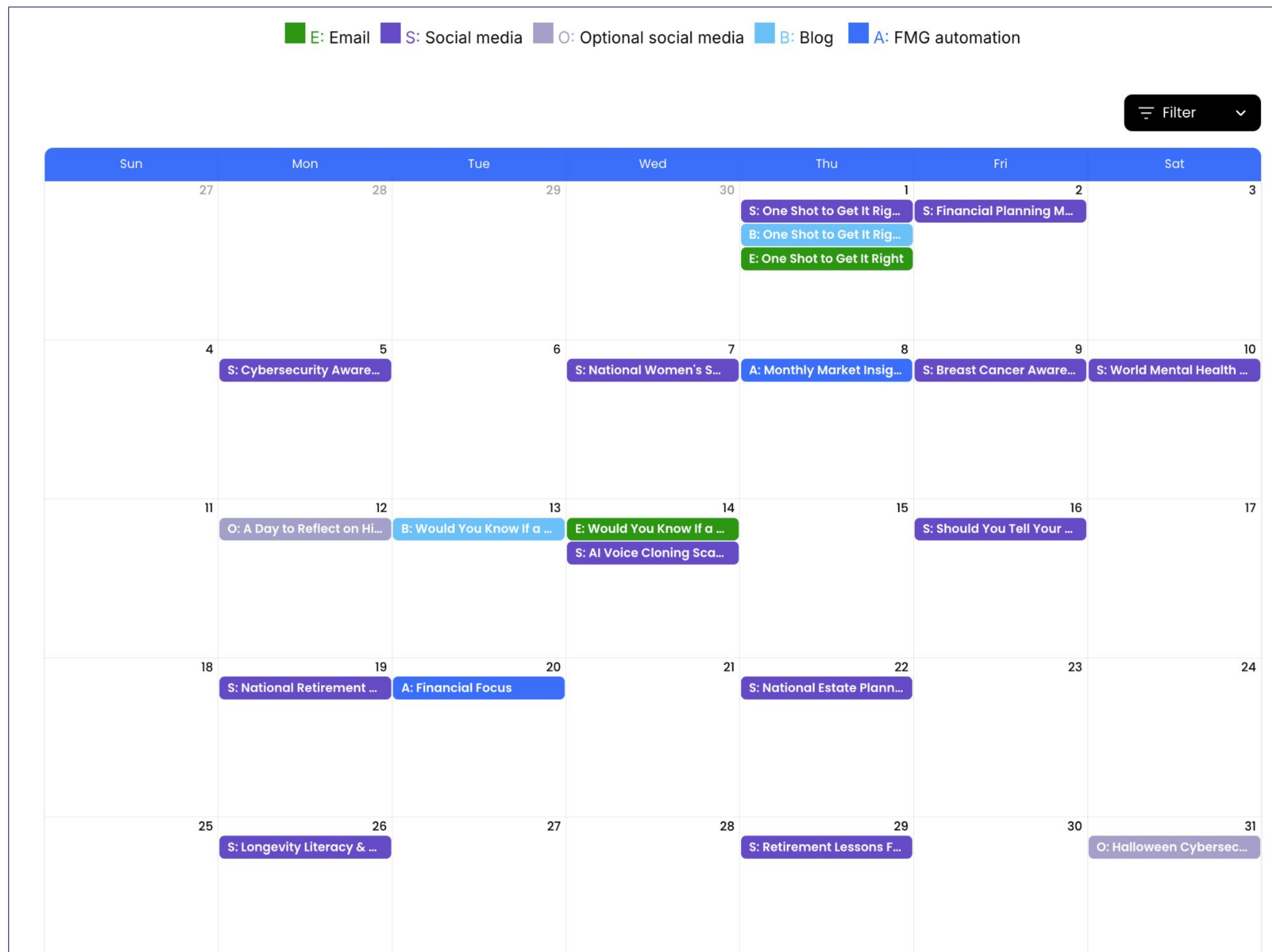
Source: NP Digital — Nov/2024. Surveyed 6637 people in different age groups. We enlisted the help of parents to also ask or tell us their children's preference

11031A_K

1

Now, let's set the foundation: put placeholders for the most important content

● 2 emails
● 2 blogs
● 3x social posts a week



1

Next, think about a “theme” for the month.

Example for October: Cybersecurity awareness month.

Social Post:

Cyber criminals pay extra attention to accounts tied to money.

A 2026 FBI study found that over 12,400 of those victims lost more than \$100,000 each, and the average reported loss across elder fraud victims that year was \$38,500. Here are a few habits to fine-tune your digital security this month:

🔒 Turn on multi-factor authentication everywhere it's offered. Yes, it's annoying, but according to a 2026 CISA report, using it makes an account roughly 99 percent less likely to be broken into. It only takes a minute to set up.

🔒 Give every account its own password. Reusing one password means one leaked login unlocks everything else. A password manager handles this without requiring you to remember dozens of them.

🔒 When you go to the dentist, put a reminder on your calendar to also change your passwords. Changing passwords often makes your accounts just that much harder to reach.

🔒 Pause before clicking. Phishing remains the most commonly reported cybercrime in the country, more than any other category the FBI tracks.

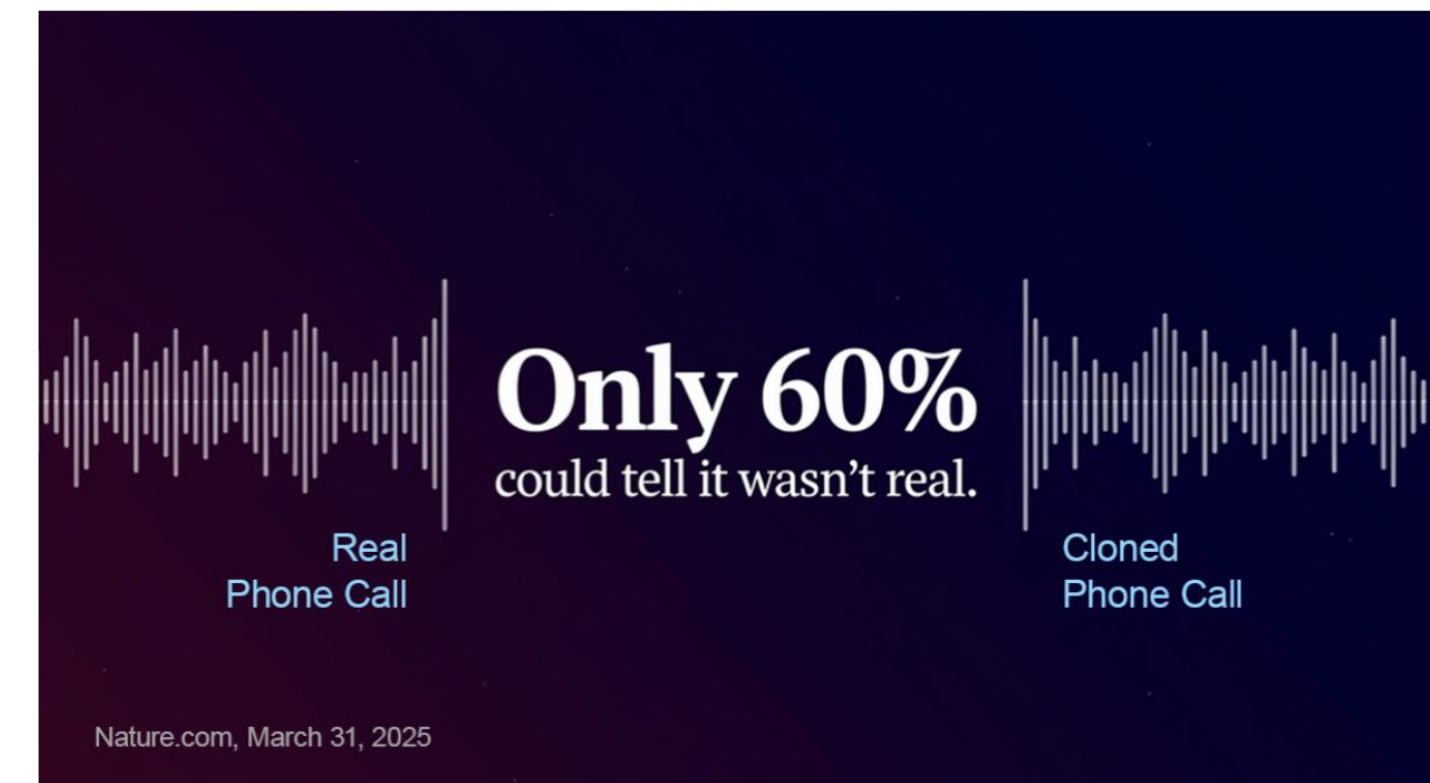
🔒 Check statements regularly, and turn on account alerts. Catching something small and wrong early is a lot easier to unwind than catching something large and wrong months later.

🔒 Consider freezing your credit if you're not actively applying for new credit or loans. This takes 15 minutes, one time.

Email:

Clients and Prospects: Would You Know If a Scammer Was Using Your Daughter's Voice?

Subject: Would You Know If a Scammer Was Using Your Daughter's Voice?



1

**Once we choose the theme, we
choose or create the content**

Playbook for **Social Media 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! 🙌

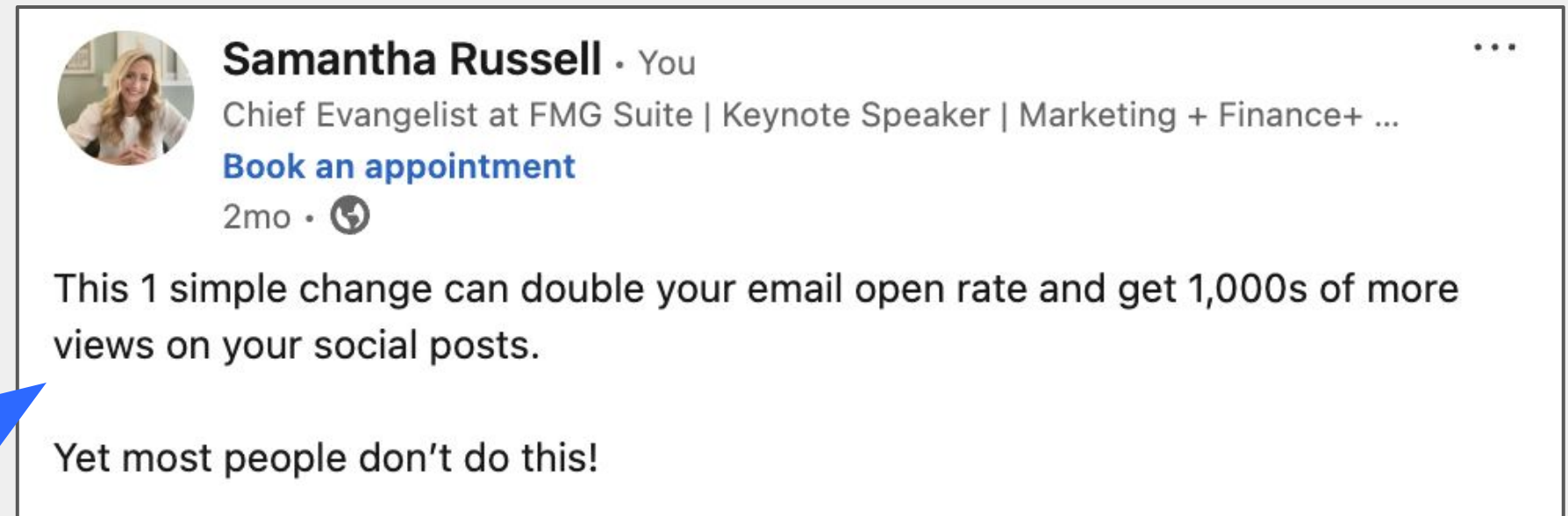
If you don't engage with others,

it won't matter how good your content is

What Stops the Scroll?

Use the “what’s in it for me mindset”
when crafting your posts

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

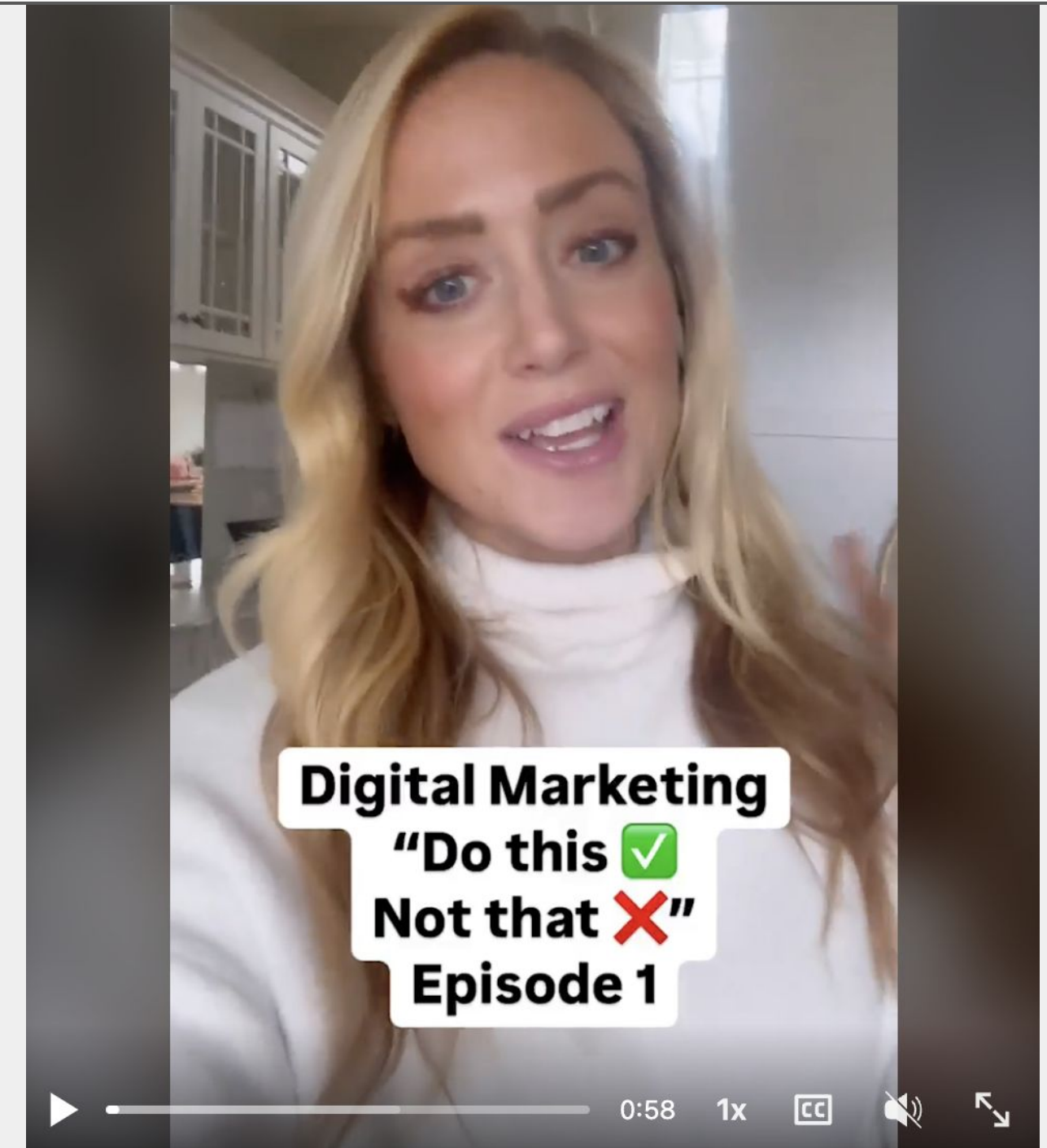


A screenshot of a social media post by Samantha Russell. The post includes a profile picture, name, title, bio, a link to 'Book an appointment', and two lines of text. A blue arrow points from the text 'Use the “what’s in it for me mindset” when crafting your posts’ to the first line of text in the post.

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!

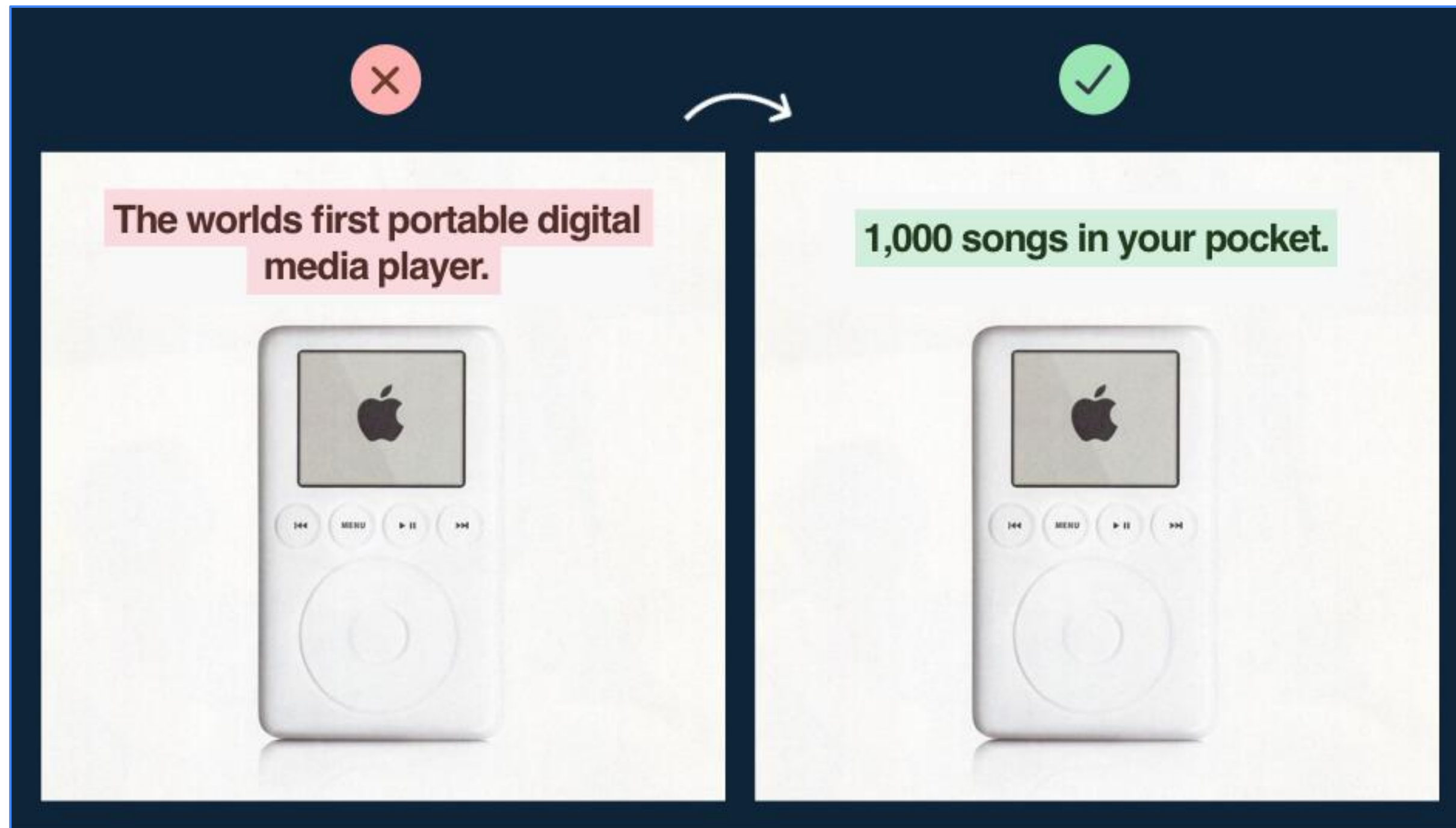


A video player showing a woman with blonde hair speaking. A text overlay is present in the bottom right corner of the video frame. The video player controls at the bottom show a play button, a progress bar, the time 0:58, 1x speed, and icons for closed captions, mute, and share.

Digital Marketing
“Do this ✓
Not that ✗”
Episode 1

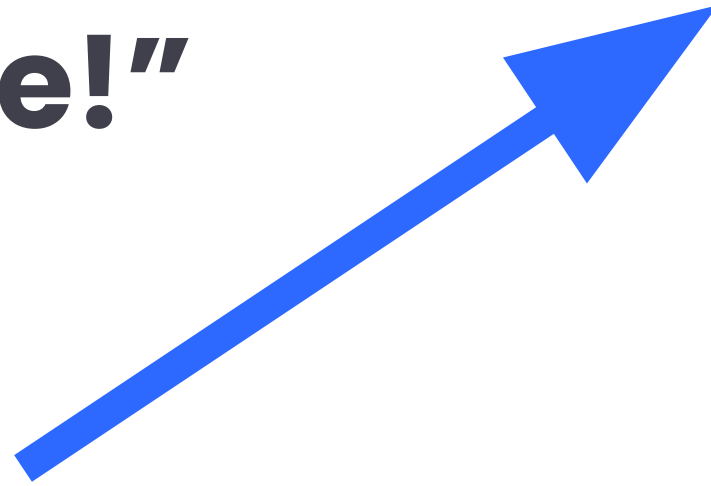
0:58 1x CC 🔊 ↗

**No one cares what you can do.
They care what you can do for THEM.**



Help the Person Think

“Hey that’s me!”



Emily Rassam, CFP® Heart-Centered ...

✓ • 1st ...

Forbes Top Woman Advisor | Investopedia Top 100 Advisor and ...

[Book an appointment](#)

1mo • 🌐

Over age 50 and earning more than \$150k?

➔ [READ THIS](#)

Recent rules require many higher-income employees' 401(k) catch-up contributions to be made as Roth contributions rather than pre-tax contributions.

- ✓ Log in to your 401(k) account and review your contribution elections.
- ✓ Make sure your catch-up contributions are set to Roth if your plan requires it.
- ✓ You'll typically find this under the "Contributions" section of your retirement plan portal.

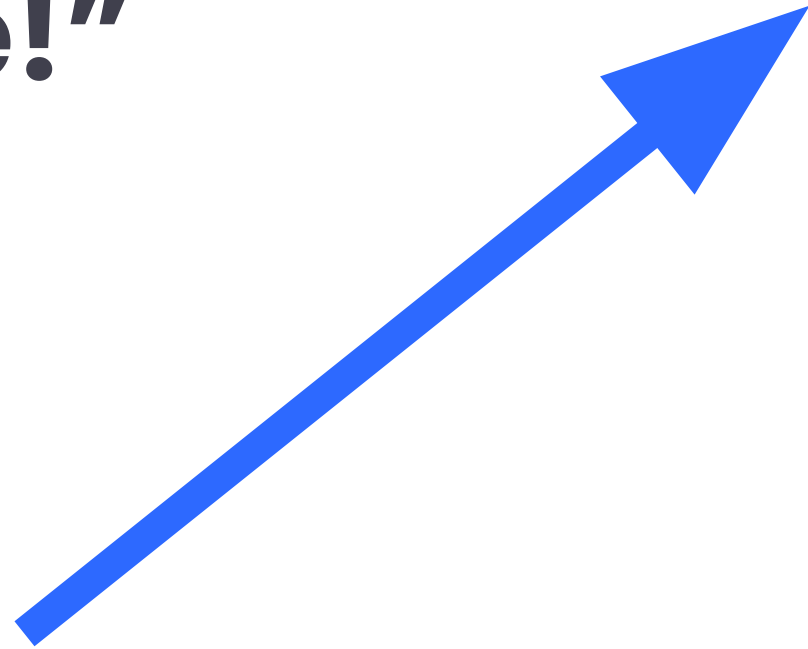
Many people who max out their regular \$24,500 401(k) contribution around this time of year are now starting to make catch-up contributions. Some plan providers automatically switch catch-up contributions to Roth, but others do not...

A quick check today could help you avoid confusion, corrections, or surprises at tax time.

As always, check with your plan administrator or recordkeeping vendor if you're unsure how your plan handles catch-up contributions.

**After they identify this
applies to them, make
them think**

**“I don’t want to make
this mistake!”**



Thomas Kopelman ✓ • 1st

Financial Planner Helping 30-50 year old Business Owners and Those With...

1d • 🌐

...

I've created over 100 financial plans in the last few years

High earners, hard workers, great careers

And I keep seeing the same mistakes over and over again

Not because these people are bad with money

Because nobody ever walked them through what they actually have access to
and how to take advantage

Here are the 10 most commonly missed opportunities financially for high income
30-50 year olds:

Aim for at least 1 personal photo per month

Research shows that engagement (number of likes, shares and comments) increases on average 10 – 20x when a personal photo or story is woven into the post.

The photo doesn't even have to relate to the content!



Playbook for Email Content

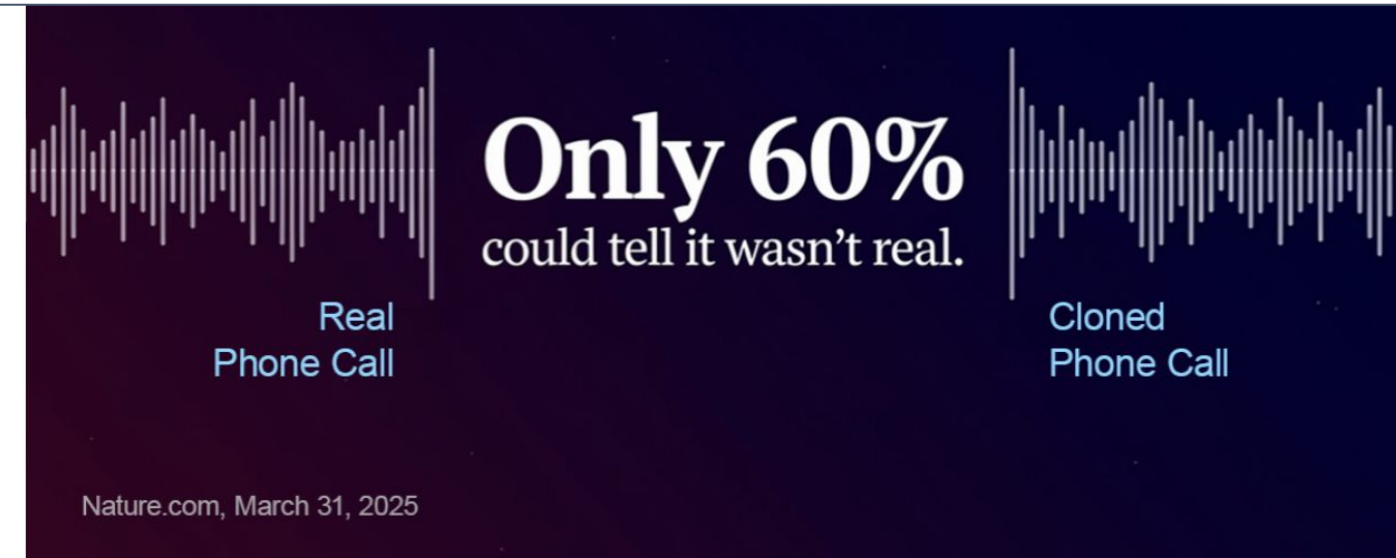
Minimum 2 emails per month:

- Both educational in nature
- can add in a breaking news one if needed
- make sure you have something to say!
- send a version to COIs, Prospects AND clients!

The mix is important! 🖐️

If your subject line isn't good, no one will see your email!

Email: before you send, ask yourself – would this get forwarded?



Would You Know If a Scammer Was Using Your Daughter's Voice?

A mother in California picked up her phone last spring and heard her daughter's voice, panicked, saying she had been kidnapped and needed money sent right away.¹

The voice had the right pitch and the right tone, even the small verbal habits her daughter uses when she's upset. She wired \$5,400 before learning her daughter was safe the entire time. What she'd heard on the phone wasn't her daughter. It was an artificial recreation of her voice, built from a few seconds of audio pulled from somewhere online.

Stories like this used to sound like science fiction. They don't anymore. Voice cloning has become one of the fastest-growing tools in a scammer's kit, and it's built to exploit something every family takes for granted: the ability to recognize each other by sound alone.

October is Cybersecurity Awareness Month, which has been observed every year

Playbook for **Blog Content**

Minimum 2 blog posts per month:

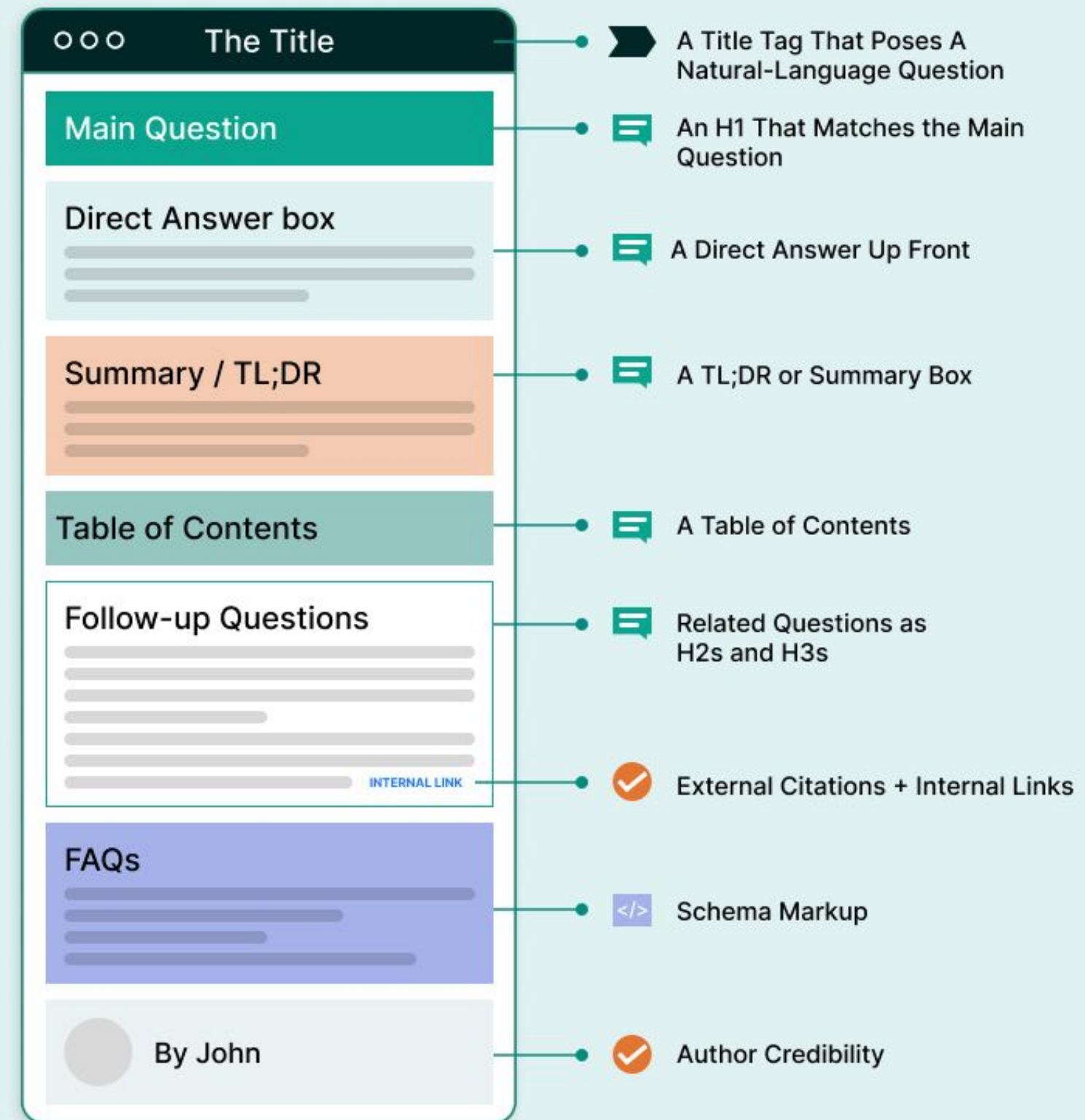
- AI has recency bias
- Make sure you add FAQs at the bottom
- Question- Answer formatting
- Attribute to an Author & add a DATE!

If you are writing blogs but not optimizing for AEO, the chance they do anything to bring traffic is close to zero

Blog:

Make sure your posts are written for AEO

The AEO-Optimized Page

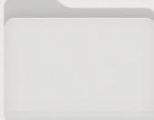


Regardless of Email, Blog or Social, Start with a Great **Hook**



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..."*

Hook Formula:

WHO THEY ARE + WHAT THEY CARE ABOUT + THE SURPRISE

Generic:

“Here are some things to know about IRMAA.”

Prospect-focused:

“Retiring soon? How much you pay for medicare could be based on a paycheck you haven't received in years.”

1 Need Help Making This Happen?

FMG's "Do It For Me" was designed to solve this problem.

Let's take a look:

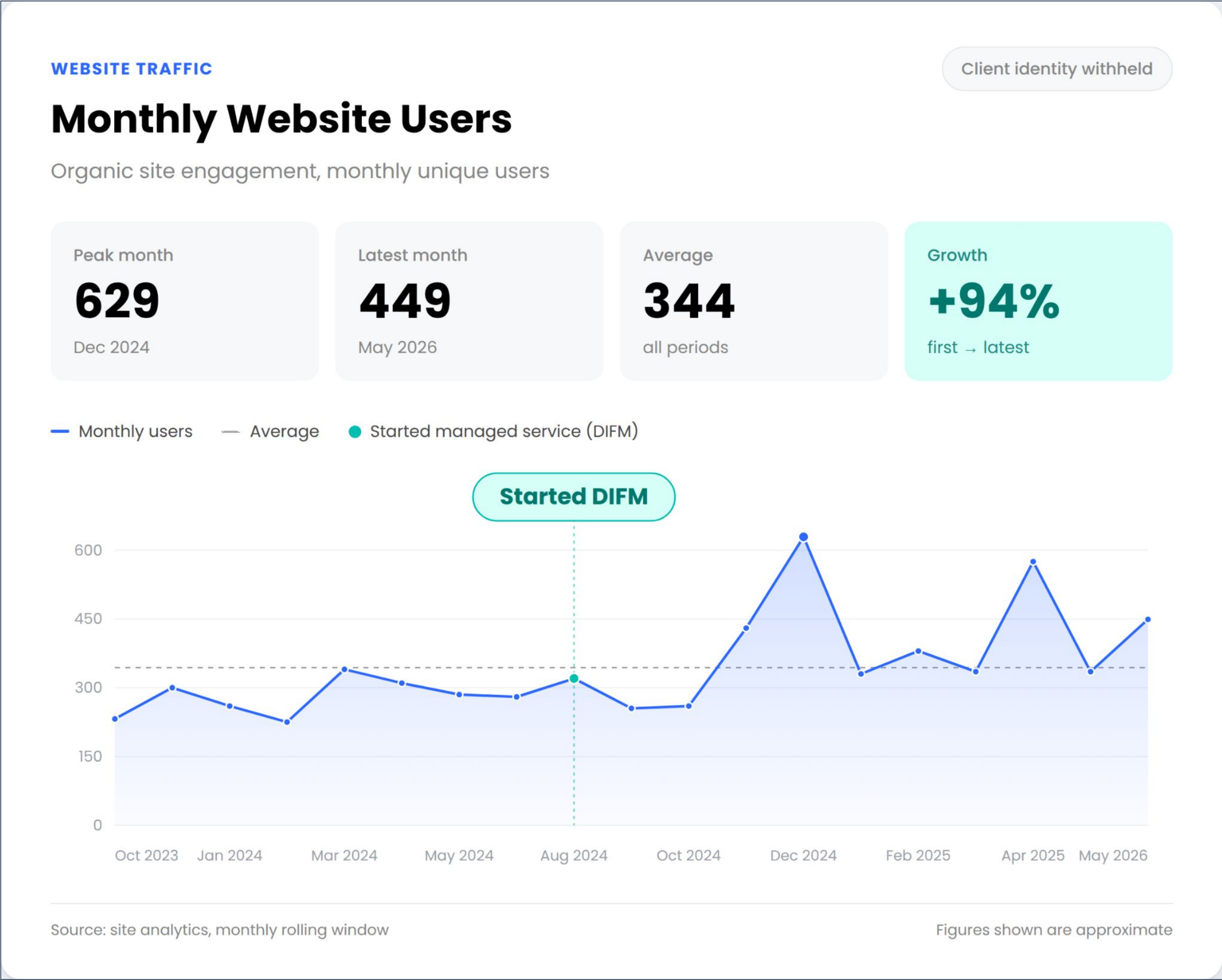
DIFM Helps With the Highest ROI Marketing

01	Blogs 2x Month	Keeps you visible and consistent. Email, social, content, and automations, all compliance-ready.
02	Emails 2x Month	The foundation. Where prospects validate, referrals land, and AI search surfaces your expertise.
03	15+ Social Posts Month	Lets you text clients compliantly. Built for financial advisors, modern new mobile app.
04	Webinar & Event Setup	Removes the execution burden. A dedicated Concierge runs marketing month after month.
05	Podcast/Youtube Script	Compliant reviews and social proof, built into the platform and surfaced on websites and Google.
06	Client, Prospect & COI Versions	Carrier, asset manager, and association expertise published in the your voice.
07	PARTNER PROGRAM Monthly Marketing Tip	Integrates with all your preferred solutions saving you time and improving execution.



One login · Built in compliance workflow · CRM integrations · Built only for financial advisors

Before & After Joining “Do It For Me”



Material Impact of Net New Contacts



352

average number of
new contacts added in
one year, per DIFM user

DIFM PERFORMANCE

Trailing 12 months

DIFM Delivers 3.5x Net Contact Growth

Trailing 12-month net contact growth rate, DIFM vs. Non-DIFM advisors

DIFM advisors

28.25%

net contact growth rate

Non-DIFM advisors

7.97%

net contact growth rate

Growth multiple

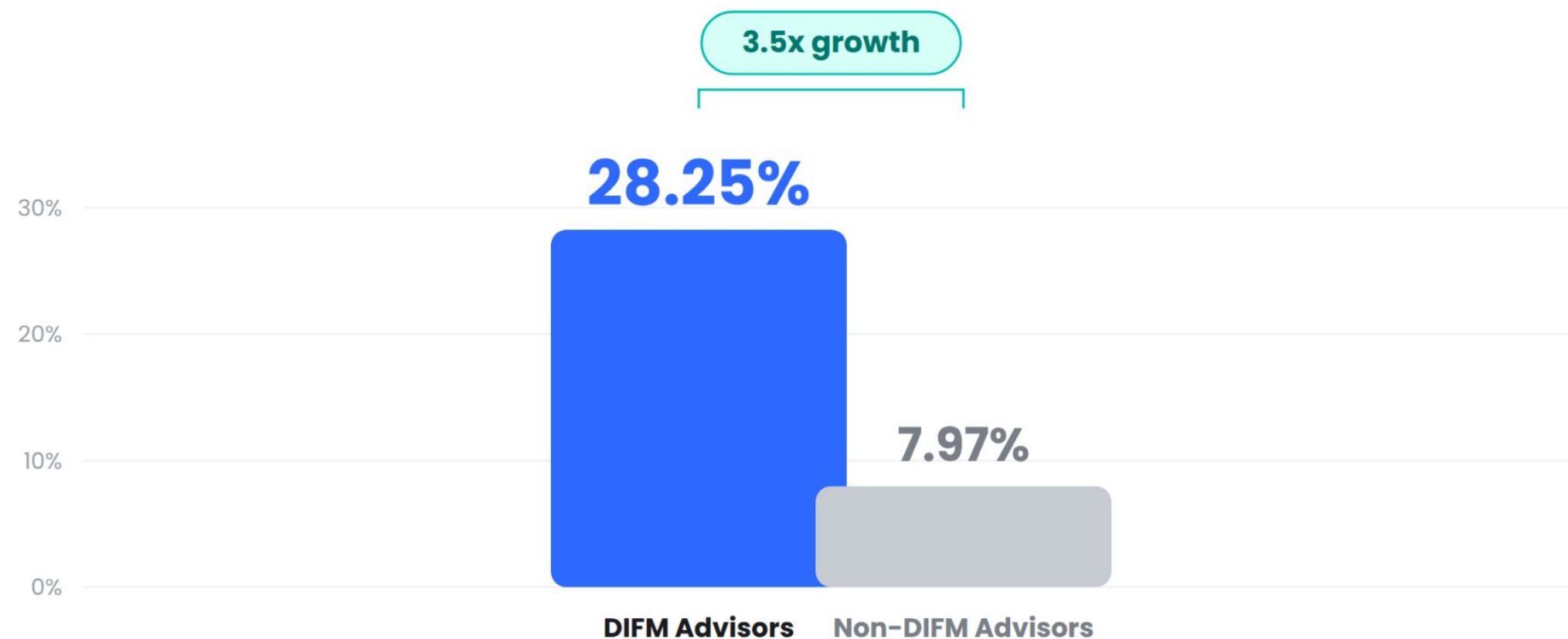
3.5x

DIFM vs. Non-DIFM

Net-new contacts

413K+

across DIFM portfolio



Source: portfolio contact analytics, active advisors

Figures shown are approximate

FMG's "Do It For Me" Marketing Program

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
			O: April Fools' Day	B: Teaching Teens and ... E: What a \$5 Frappucci... S: Financial Literacy Mo...	S: Teaching Young Adul...	S: National S...
5	6	7	8	9	10	11
O: Easter	O: National Autism Awa...	A: Monthly Market Insig...		S: How Much Will Health...	S: National Siblings Day	S: National P...
12	13	14	15	16	17	18
		B: When Should I Start T... S: Making the Right Call...	E: When to Consider Ta...	S: Caring for Aging Pare...		
19	20	21	22	23	24	25
		A: Video of the Month	S: Administrative Profe...	S: Take Your Child to W...		
26	27	28	29	30		



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Do It For Me
MARKETING

Hi there!

Below is your **April 2026 Do It For Me Marketing Calendar**, along with a video from Susan Theder providing a summary of the strategies and highlights. As always, these are each thoughtfully written for you by our most senior thought leaders and reflect your feedback and suggestions. Our goal is to provide you with blogs, emails, and social posts that set you apart from the competition and impress your clients and prospects. We welcome your edits, comments, and suggestions for future months and look forward to executing these on your behalf so you can sit back and relax, knowing your marketing efforts are hitting on all cylinders!

[Click Here to view your April calendar and Video](#)

[As a reminder: you are automatically opted-in to all the monthly content](#)

Sincerely,

For DIFM Marketing Team

fmg

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

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com

