



LIVE WORKSHOP

How to **Get Confident** **on Camera** and Turn **Engagement** **into Growth**

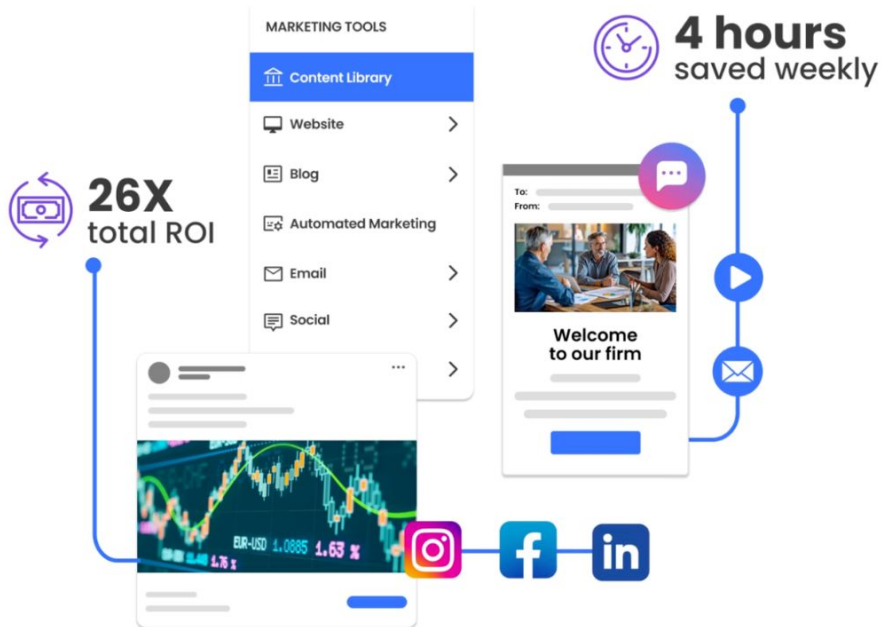




Your partner for what's next in advisor marketing.

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

fma

fmg



Video Checklist

Keep this checklist handy to ensure you're creating high-quality, impactful videos that **showcase your expertise and connect with your audience**

Camera

- ☐ Smartphone or Webcam
 - Optional: tripod for stable recording

Location

- ☐ Quiet, minimal background distractions, natural light source (near a window)
- ☐ Professional, clean background (but don't skimp on any personal touches - people love seeing art pieces, autographed jerseys or family photos in the background)

Content

- ☐ Script development
- ☐ Identify any graphics/pop-ups to include

Recording Best Practices

- ☐ Business casual attire (or what you'd wear in a client meeting)
- ☐ Speak conversationally
- ☐ Use storytelling techniques (pretend you're talking to a friend)
- ☐ PRACTICE and re-record as many times as you'd like (nobody needs to know how many takes it took)

Editing

- ☐ Tools like Veed make it really easy to edit
- ☐ Quick edits to
 - Remove dead space at beginning/end
 - Check audio levels
 - Add subtitles
 - Add any visual elements

Post-Production

- ☐ Don't forget to submit to compliance and obtain necessary approvals
- ☐ Create video thumbnail and write a 1-2 sentence description
- ☐ Distribute:
 - YouTube
 - Website
 - Email newsletter
 - Social media

get

and a
nowhere,



f

show your high school looks just like my high school in my family when I was growing up and I have an emotional connection that you make. It's an interesting way to have a personal connection with others.

add
management

on Offer:

15-minute consultation tailored to your needs. We'll show you exactly how we can help you achieve your goals with little effort on your part.

w

800-251-2520

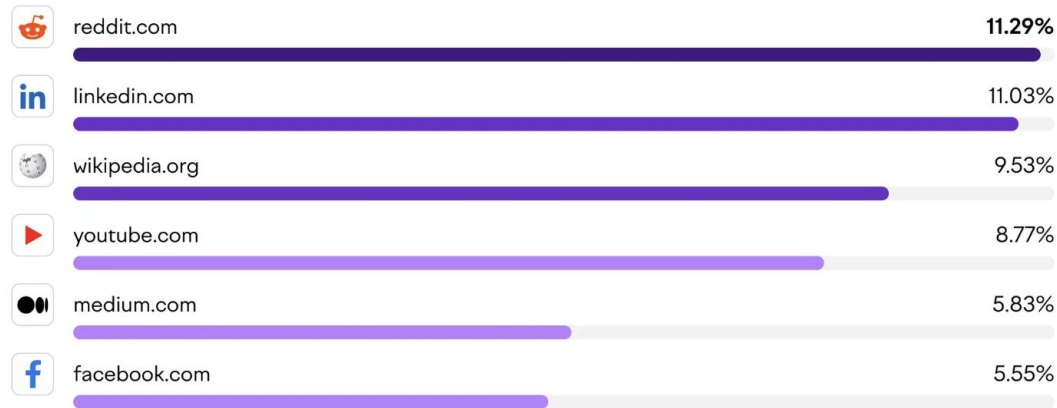
fmg

Why Is Getting Your Team on **Video** More Important Than Ever?

Youtube is a TOP Citation in AI Search

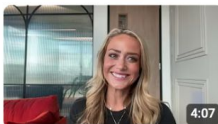
Top Domains Cited by LLMs (ChatGPT Search, Perplexity, Google AI Mode)

January 2026



Even Youtube Shorts Can Help Your AEO!

Popular videos



Introducing FMG's Three New AI Tools
▷ 28K 1y ago



How Do the Affluent Find a New Financial Advisor? ...
▷ 17K 6y ago



Marketing for Financial Advisors in 6 Easy Steps
▷ 14K 8y ago



Chad Parmenter: Playing the Long Game
▷ 6.9K 1y ago



7 Social Media Post Ideas Proven to Work for Financial Advisors
▷ 6.2K 5y ago



How Your Lackluster Website is Hindering Your Firm's AUM
▷ 4.7K 7y ago

Shorts



3 Simple Ways To Get More Google Reviews...
444 views



Samantha Russell's "Comment for X" Social...
624 views



Get AI to Recommend Your Business: You ...
708 views



LinkedIn Insider Tip That No One Tells You ...
625 views



Be Ready When the Luck Happens: CRM ...
789 views



Flesch Kincaid Readability Score -- ...
1.6K views

01

Setting up the Shot

Option 1: Your Phone! Use Grid to Frame Shot

(Settings > Camera > Toggle "Grid" to ON)

Your eyes should align with the top line!



**Use the REAR camera, NOT the selfie camera.
Oh, and get a tripod!**



Forget fancy equipment. Use NATURAL light when possible.

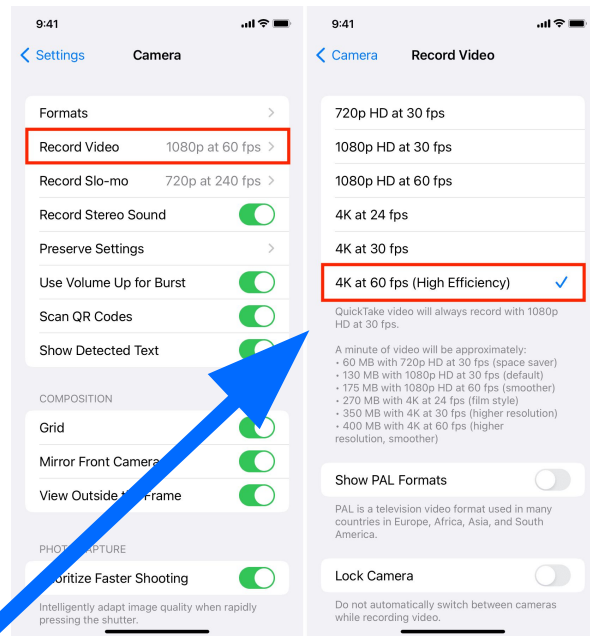
Sit in front of a window, so that you are looking into it, with the light streaming onto your face



Camera Settings to Adjust:

Found under Settings > Camera > “Record Video” tab

1. **Choose 4k at 30 or 60 fps** (best resolution/frames per second for capturing detail and helping footage look cinematic)
2. **Toggle “HDR Video” to off** (this makes it easier to edit later)
3. **Turn on “Enhanced Stabilization”** (keeps the frame steady while you’re recording)
4. **Exposure:** Tap around screen to adjust exposure (control brightness and focus)



Do NOT text or email
the video from phone
to computer.

Airdrop it !

**OR, upload to
dropbox, wistia,
Google Drive,
then transfer**



Option 2: On Your Computer

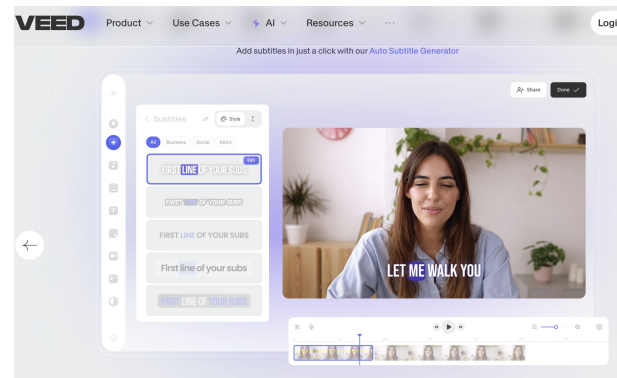
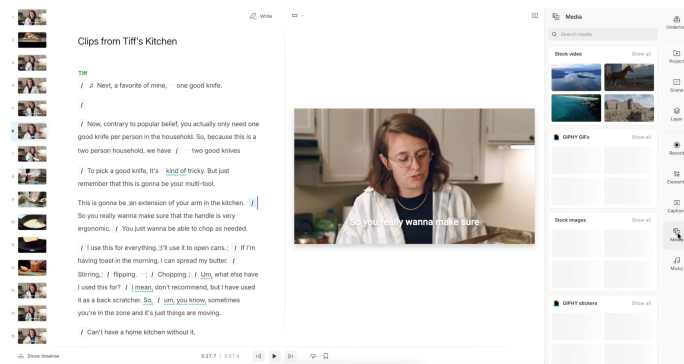
Better for Horizontal & Screenshares

[Veed.io](https://veed.io) generally considered better for:

- Beginners (due to straightforward layout)
- User-friendly interface
- Creating short social media clips or repurposing existing video content across platforms.

Descript, generally considered better for:

- Podcast + video
- Want advanced text-based editing,
- Detailed video manipulation by editing transcripts
- Want to use AI to record once - easily remove errors and splice back together



02

Recording – Start with a Great Hook & Feel
Confident on Camera

Script vs. Outline

I recommend this



Samantha Russell

Video for Youtube Channel

Video Title: How to Get More Google Reviews | Financial Advisor Testimonials - SEC Ad Rule

To Post: Thursday, March 11th

Blog Post that inspired this video that we can link to:

<https://blog.twentyoverten.com/how-can-financial-advisors-get-more-google-reviews-6-simple-strategies/>

Headshots to use for thumbnail (sent via slack)

|

New SEC Ad Rule is poised to go into effect on May 4th, 2021.

Why Google Reviews? (we can link to blog post we have on this

<https://blog.twentyoverten.com/seo-for-financial-advisors-everything-you-need-to-know-about-google-reviews/>)

1. They help your SEO
2. They act as social proof - verify to outsiders that your business is legitimate

4 Strategies to To Get More Google Reviews:

1. Setup and Optimize your Google My Business Page ([link we can share](#))
2. Add a link in your email signature
3. Email all of your clients asking them to leave you a review - share a link directly making it easy for them
4. Include a Google Review Request in the footer of your website

Visuals to Consider adding in:

Click Here to Rate Us

This link will take you to Google to rate us publicly on the web. We appreciate your comments and recommend that you avoid

How to Start Your Video: The Hook

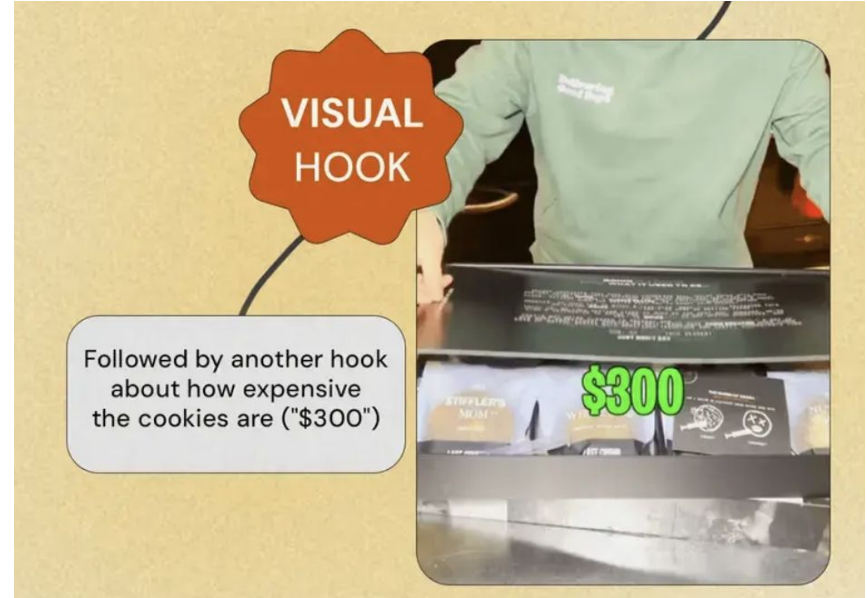
- The first 5 seconds are CRUCIAL
- Don't introduce yourself first
- Start with a bold statement, fact or story
- OR, share exactly what someone will from watching the video



Samantha's **Quick Tip:**

[Start your video with a hook](#)

Know How to Use Both Verbal Hooks & Visual Hooks



How To Write Hooks

That Truly Capture Attention

Learn The 5 Types Of Hooks

1 How I	2 How to	3 Start a story	4 Captivating quote	5 Surprising statistic
A personal guide on achieving a dream outcome.	A super comprehensive guide on achieving a skill/ outcome.	Share an inspirational story that motivates others or builds authority.	Use a topic-related quote that deeply resonates and captures attention.	Start off with a powerful statistic in relation to the post topic.

20 Powerful Phrases And Words To Use In Your Hooks

1 Descriptive	2 Actionable	3 Fear Building	4 Scarcity/Urgency	5 Statistic/Number
"Killer" "Insane" "Ultimate" "Secret" "Rare"	"How to" "When to" "Why you should" "If you do this..."	"Warning" "Stop" "Do Not" "Attention"	"Steal" "Don't miss" "Quickly"	"10X" "10 [ADJECTIVE]" "The 10 Best"

10 Templates to Write a Great Hook

10 Hook Templates		
1 X biggest mistakes [TARGET AUDIENCE] make about [DREAM OUTCOME].	5 Good [INDUSTRY SKILL] shouldn't be a mystery. It's a skill you can learn.	8 [SUPER FAMOUS QUOTE ABOUT TOPIC]. Here is the Ultimate guide to [ACHIEVING DREAM OUTCOME].
2 [Time frame] ago, I stopped [COMMON INDUSTRY MISTAKE]. I then achieved [POSITIVE OUTCOME].	6 People are [CRAZY STATISTIC] after doing [POST TOPIC]. Here is the guide to nailing [POST TOPIC].	9 [TOPIC] is not about [MISCONCEPTION]. It's about [SOLUTION].
3 10 Harsh [INDUSTRY] Truths After doing [SOCIAL PROOF/AUTHORITY].	7 The best [INDUSTRY] lesson you'll receive today: [From someone who has AUTHORITY/SOCIAL PROOF].	10 The ability to [DO X] is a superpower.
4 Stop [COMMON INDUSTRY MISTAKE]. Instead, [USE MY SOLUTION].		

Example Hook Ideas

1. I've helped 100 people retire. Here's what most of them said they wish they'd done before retirement
2. Before you apply for social security, watch this
3. Scared about being bored in retirement? Try this
4. If you have RSUs, avoid a huge surprise tax bill with this tax planning strategy
5. If you have a net worth over 2 Million, here's what you need to know before you retire

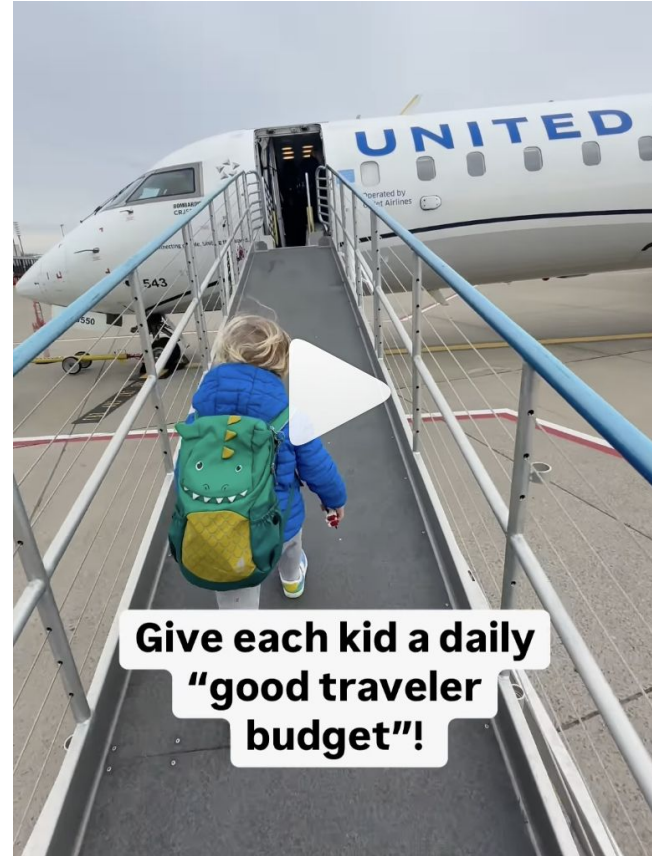
Example Hook Ideas, Part 2

6. What NOT to do when claiming social security
7. If you are under 45 and making \$150K or more a year, you need to know this
8. Struggling with high tax bills? Watch this
9. Business owner with less than 50 employees? You need to know this about getting health insurance for staff
10. The absolute WORST advice about saving money for retirement

Exercise:

What would be a good “hook” for a video teaching parents about the idea of giving your kids a set budget each day when traveling?

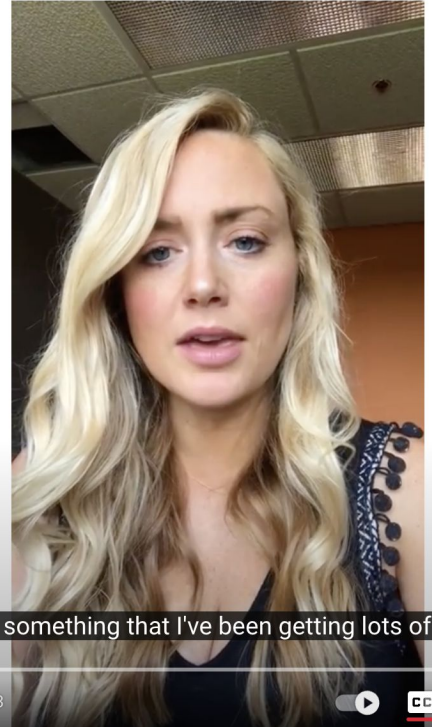
- A. Have you heard of the “Good Traveler Budget”?
- B. 💰 Would you pay your kids to have good behavior on a trip?
- C. I used to worry about how my kids would behave on flights, until I learned this ONE thing



How to Feel Confident on Camera

- Write down the hook, then 2-4 main takeaways
- Record EVERY practice shot - just keep the camera on!
- Do “interview” style if speaking alone feels too awkward

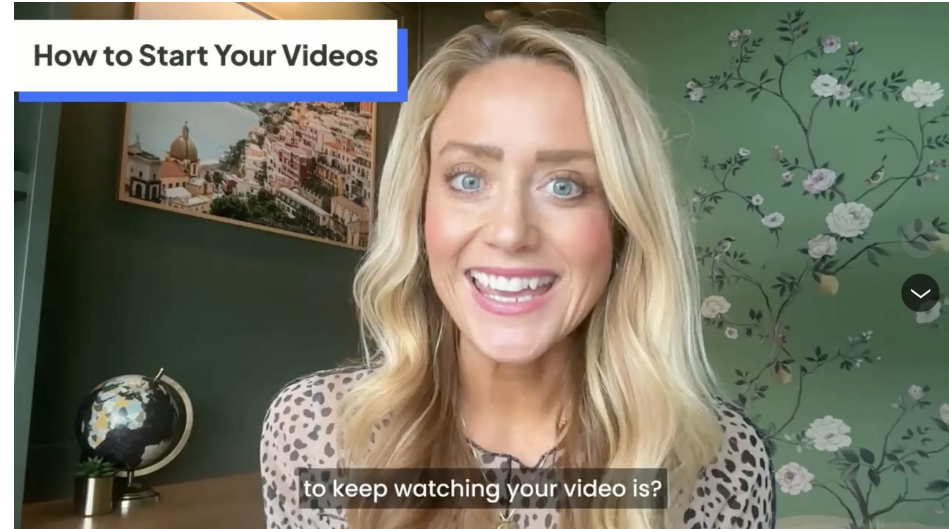
✗ My first videos were AWFUL!



Feeling Confident on Camera

- SMILE!
- Stand up for more energy
- Don't stop talking if you mess up
- Pretend you are Explaining something to a friend

✓ Better lighting, background, camera angle and energy!

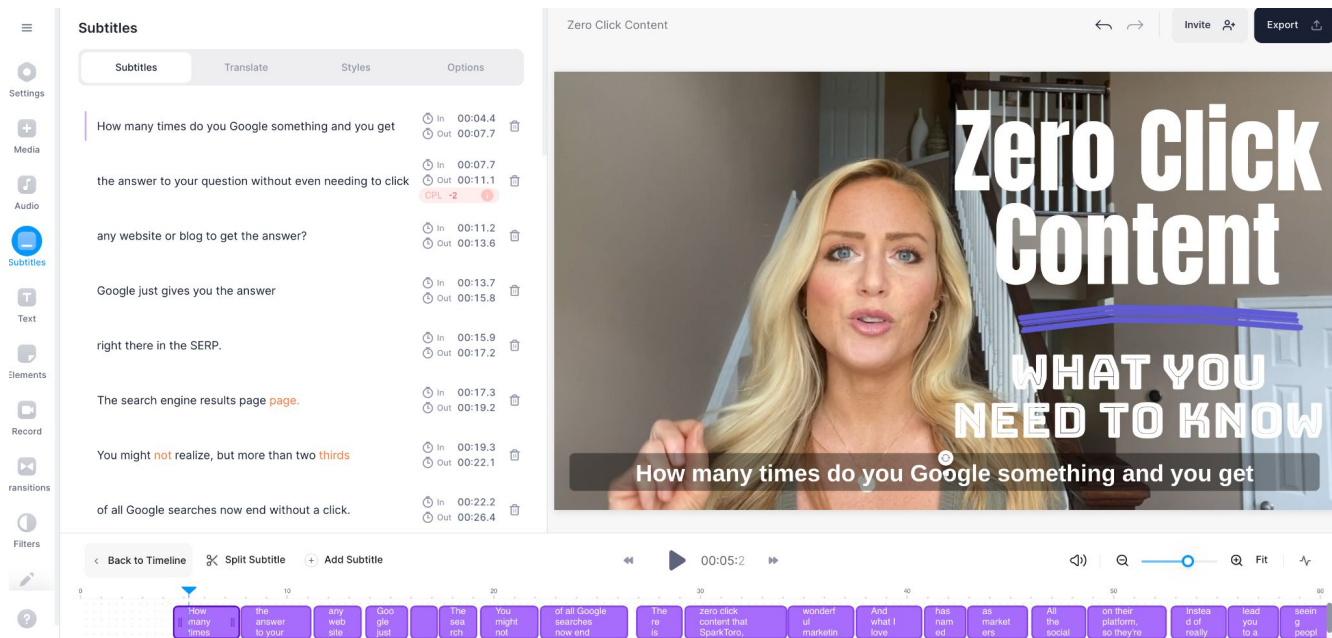


03

Editing Made Easy

On your Desktop, Edit using Veed or Descript

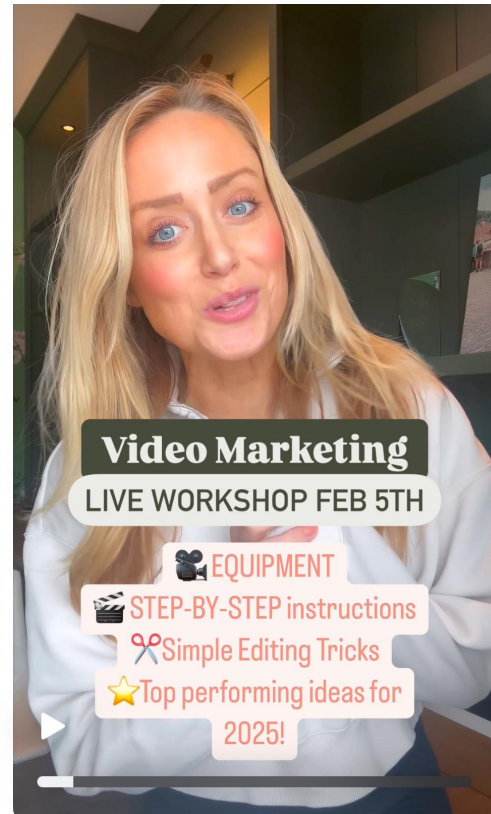
- Add subtitles
- Put Text over video
- Cut sections
- Splice together
- Bring in images
- and more!



On Phone, Edit Vertical Videos for Social Media & Youtube Shorts

Tools:

1. CapCut
2. Canva
3. Instagram
4. Imovie
5. Inshot



03

Promotion

Enhance regular email communications

Incorporating video leads to a **300% increase in email click-through rates**.*

- Add a personal message
- Use video content, such as FMG's Monthly Marketing Insights or Video of the Month to share expertise
- Add a video synopsis with your commentary of the content



79%

of consumers would rather watch a video about a product than read about it*

On Your Website: Make Sure to Include the FULL Transcript



[ABOUT US](#) [WHO WE SERVE](#) [WHAT WE DO](#) [BECOMING A CLIENT](#) [PODCAST](#) [RESOURCES](#)

The Biggest Mistake High Earning Parents Make When Saving for College | Ep. 4

MAY 20, 2026 · INVESTING, TAX STRATEGY

Watch the Episode



In this episode of Beyond the First Million, Gideon Drucker and Jordan Haines break down the key considerations behind education and family planning, including how to think about saving for college versus saving for retirement.

They discuss the benefits and flexibility of 529 plans, common misconceptions around education funding, and why financial planning decisions should be based on a family's overall goals rather than a one-size-fits-all approach.

The conversation also explores teaching children financial responsibility, multigenerational wealth planning, gifting strategies, and how families can use their wealth to create opportunities for future generations.

Topics Covered

[Introduction \[00:43\]](#)

[It Depends: What Education Planning Really Comes Down To \[02:18\]](#)

[How a 529 Plan Works \[06:14\]](#)

[529 Flexibility, Beneficiary Changes & Legacy Planning \[08:07\]](#)

[Listener Question: Kids on Payroll vs. 529 \[11:14\]](#)

Transcript

Below is the full transcript for Episode 4 of Beyond the First Million.

[Introduction \[00:43\]](#)

Gideon: Welcome back to Beyond the First Million. I'm your host, Gideon Drucker, alongside my co-host and colleague, Jordan Haines. How are we feeling today?

Jordan: Feeling great, ready to go.

Gideon: Yeah, we're excited for this episode. Last week we got into the weeds a little bit about what to look for when you're speaking to a financial adviser, you're thinking about hiring one, and some of the nonsense financial advisers sometimes like to talk about. Not us for sure, definitely not us, but other financial advisers.

Today we're talking about all things education planning, family planning, how to think about saving for college versus saving for retirement. And you'll be unsurprised to hear that we have thoughts about all of this. When it comes to family planning, education planning, we try not to get too deep into the weeds on naming individual types of accounts or strategies because I don't really think that's the point of the podcast. But I think that'll come up a little bit more here than maybe some other episodes because I just think it's kind of unavoidable talking about 529 plans, for example. We'll get a little bit deeper into the weeds on them as we go. But I think a good starting point for this conversation is... I'm stealing something that CPAs say all the time, but when people ask, "Should I do this or should I do this? What's the best tax strategy?" I'm putting you on the spot here, but what's

How to Share Your Video: Email

- Make sure you put {VIDEO} in subject line
- Choose a great thumbnail to get people to watch
- **Horizontal** for Email!

Upload A Video



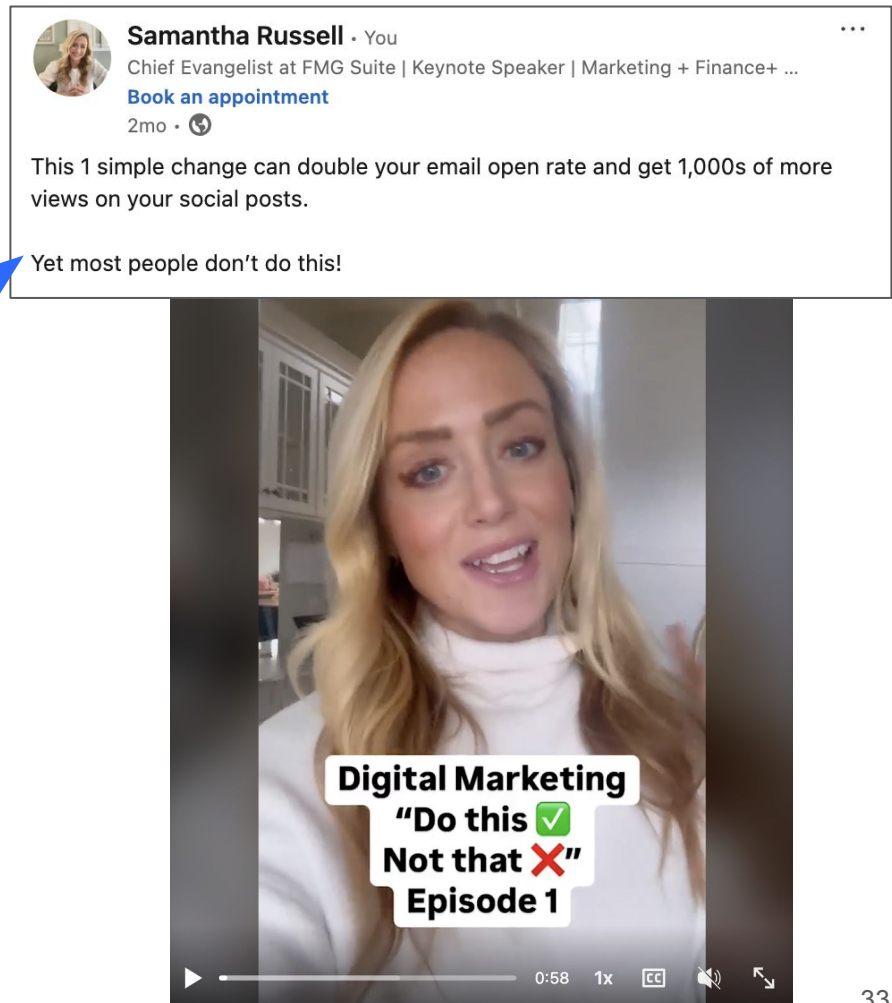
What should be on the homepage of your website?

Timestamp

  6

How to Share Your Video: Social Media

- The “hook” you write can be different than the text on the video thumbnail
- **Vertical** for Social!



A screenshot of a social media post from Samantha Russell. The post includes a profile picture, name, title, a link to book an appointment, and a video thumbnail. A blue arrow points from the text 'The “hook” you write can be different than the text on the video thumbnail' to the text of 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.

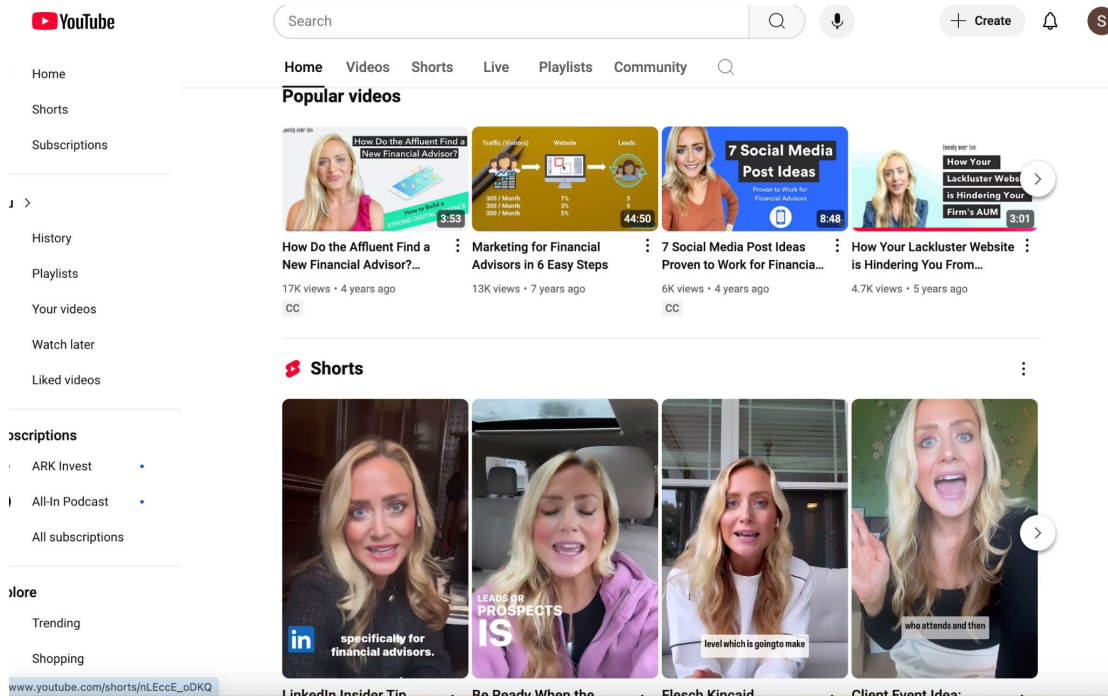
Yet most people don't do this!

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

0:58 1x CC 🔊 🔗

How to Share Your Video: Youtube

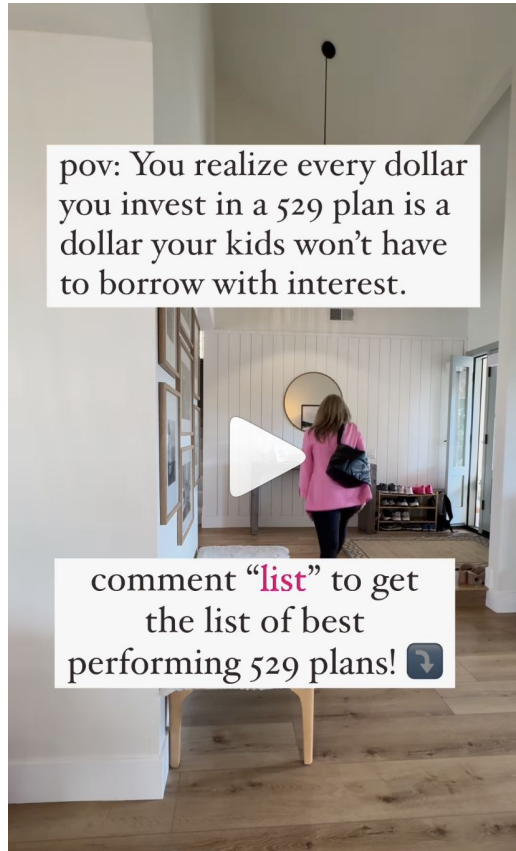
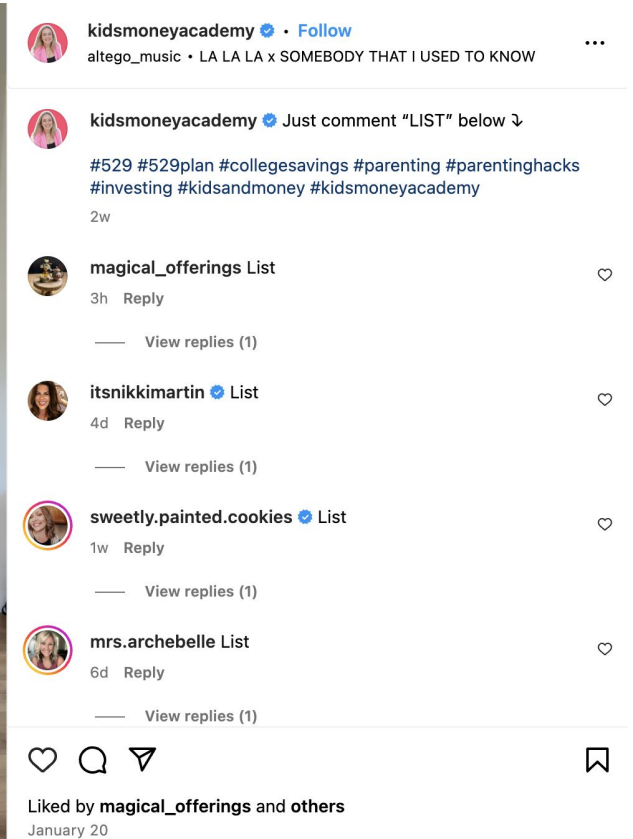
- Use TubeBuddy to help you get great SEO on your videos
- **Horizontal** for regular Youtube, **Vertical** for Youtube Shorts! for Social!



How to Share Your Video: Instagram

- Use **REELS** to grow your audience

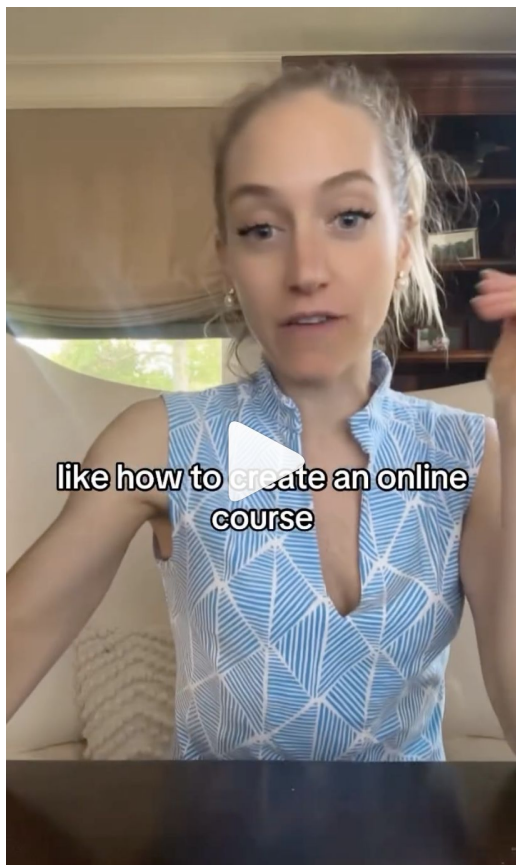
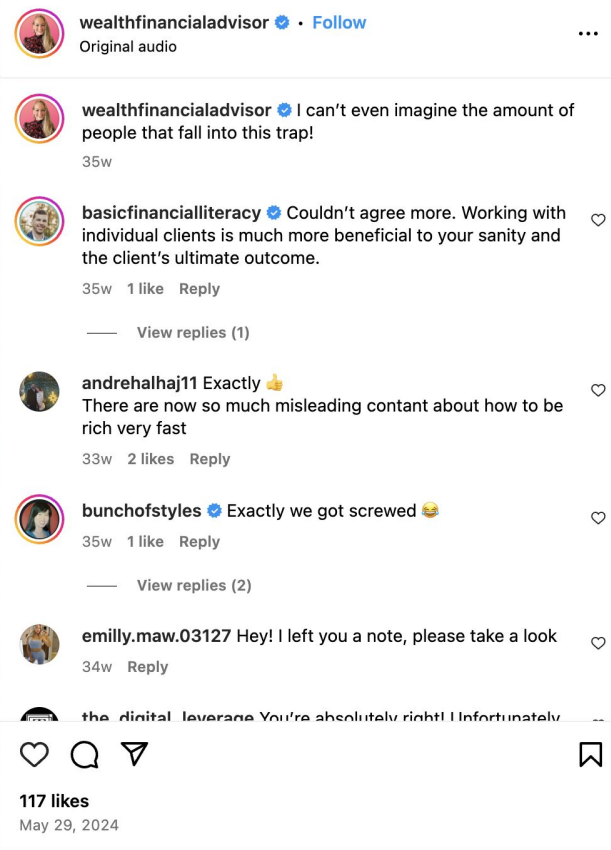
Use **STORIES** to connect with the followers you already have



How to Share Your Video: Instagram

Use a mixture of B-Roll and “Talking Head” videos

People want to see the PERSON behind the Business!



Source: <https://www.instagram.com/wealthfinancialadvisor/>

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				

Marketing Can Feel Hard

Hopefully this makes it a bit easier!

Questions?

Want to learn more about FMG?

Email: marketing@fmgsuite.com