



LIVE WORKSHOP

# What Millions of Pieces of Content taught us **About which content actually converts**



**Samantha Russell**  
Chief Evangelist at FMG

# Content Giveaway

All registrants get this!



fmg

## Content Themes Calendar



### Your Year-Round Guide to Marketing That Connects

Below is your month-by-month roadmap of content themes that have driven real engagement for financial advisors in FMG's Do It For Me Program. Take this inspiration for your own campaigns – blogs, emails, and social posts – to stay top-of-mind with clients and prospects all year long.



**47% open rates**

Do It For Me emails average 47% open rates – more than double the industry average of 21%

#### JANUARY

##### **New year, new plans**

- Key financial insights from last year and what to watch in the new one
- Annual contribution limit changes and automatic contribution setup
- Identity theft and financial security tips

#### FEBRUARY

##### **Tax season confidence starts with you**

- Surprising Social Security facts that affect retirement planning
- When clients can expect their 1099s
- IRA contribution deadlines and tax appointment scheduling



**Pro tip:** Partner with a CPA to co-host a tax strategies workshop. Both parties promote it, and you walk away with new prospect contacts to nurture all year.

# One choice gives you all the choices.

We're the only all-in-one compliant marketing solution for financial advisors. So you can orchestrate and scale authentic, effective marketing and communications, across all mediums.

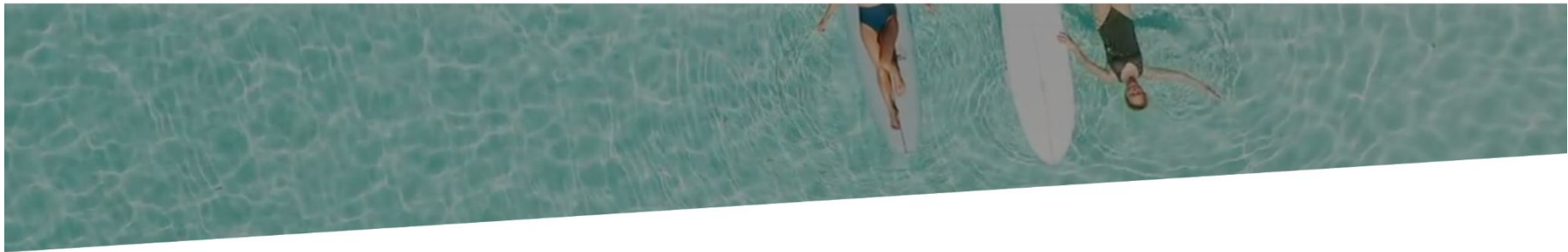
Websites. Social. Email. Events.

Testimonials. Texting. Compliance

# Foundation

# 1. Make sure your Messaging Passes the 5 Second Test

- Get ***crystal clear on your niche***. If you try to speak to everyone, you resonate with no one. Clarity is a growth multiplier.
- Use my favorite framework:  
“I help **[WHO]** To **[DO WHAT]**, so they can **[2-3 BENEFITS]**.”
- Update your website, linkedin profile, EVERYWHERE



WELCOME TO RADIX FINANCIAL

## WE'RE GLAD YOU'RE HERE

Radix delivers wealth management solutions for multinational high-net worth clients across the globe.

- ✔ **Disciplined, Long-Term Focus** – Strategies designed to maximize returns through patience, consistency, and data-driven decision making
- ✔ **Transparent Fee Structure** – No hidden costs, no surprises—just clear, straightforward pricing you can trust.
- ✔ **Community-Driven Success** – Rooted in meaningful partnerships and shared values.

MORE ABOUT US





[MID-CAREER PROFESSIONALS](#) [GOOGLE EMPLOYEES](#) [AMAZON EMPLOYEES](#) [META EMPLOYEES](#) [WALMART EMPLOYEES](#)

## Our Experience Working With Amazon Employees



Our team has a wealth of experience in working with clients at Amazon. If you work at Amazon, it's likely you've been granted stock as part of your overall compensation package. We've helped product managers make decisions around their RSUs, engineers add after-tax contributions to their 401(k)s. And we've designed **Financial Life Plans®** that are tailored for Amazon employees to achieve their goals.



# Clear messaging and a focused niche is **CRITICAL** to win in AI Search (AEO) and for Human attention

how important is it to have a niche for aeo

a few seconds ago

In Answer Engine Optimization (AEO), having a clearly defined niche is **critically important**. Unlike traditional SEO, which often favors broad domain authority, AEO prioritizes **specific expertise** and **topical authority**. [🔗](#)

Here is why a niche is vital for AEO success:

- **Establishment of Topical Authority:** AI engines and LLMs reward "depth over volume". By focusing on a specific niche, you create a "dense footprint" of specialized data that AI systems recognize as more credible than surface-level content from generalist platforms.
- **Capturing Long-Tail Queries:** AI chat interfaces encourage queries that are significantly longer and more specific than traditional searches. A niche focus allows you to become the **primary citation** for highly specific "long-tail" questions that general competitors cannot answer with depth.
- **Competitive Edge for Small Businesses:** AEO allows smaller companies to compete with industry giants because it values **authentic expertise** over massive domain size. Small businesses can win by being the "recommended dish" in their specific category rather than just one of many options on a broad menu.

# 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 always performs well.

### Email Overview

Showing data for 50 email blasts out of 91 total email blasts

Scheduled 0

Delivered Emails 100

Open Rate --

Click Rate --

Search by subject  Search

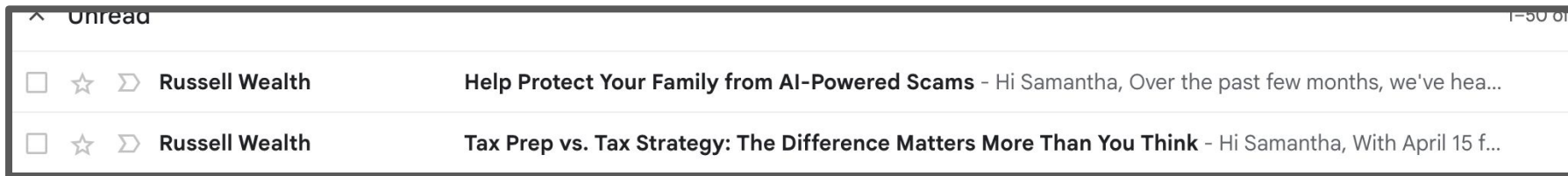
MM/DD/YY - MM/DD/YY Subject Status

Send Date	Subject	Status ↑	Sends
02/02/2026	Dueling Mandates: The Fed's Polic...	Sent	2
01/26/2026	The Productivity Advantage: Powe...	Sent	2
01/20/2026	Unearthing the Metals Melt-Up   J...	Sent	2
01/13/2026	Any changes in the new year?	Sent	2
01/12/2026	Earnings Preview: Double-Digit Str...	Sent	2



## 2. Spend Time Writing Subject Lines like Headlines

- It's all about the Hook
- Curiosity + clarity beats "Monthly Newsletter" every time.
- FMG's "Do it For Me" Program Email Open Rate: 45-60% on average



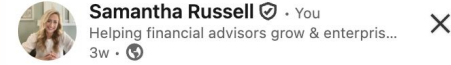
## **Send a Personalized "Check-in" to Your Top 20 Clients**

- 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.

# LinkedIn

# Audit Your Social Media Audience

- If your social media feed is full of other advisors, you're doing social media wrong.
- At least 60% of your feed should be your TARGET audience.
- Right content for the RIGHT audience



If you are a financial advisor and your feed is filled with other financial advisors.... you are doing LinkedIn wrong 😞

Here's what it should look like instead:

1. You are an advisor who helps small businesses with exit planning - Your feed should be filled with business owners, and content targeting the problems small business owners face.
2. You are an advisor who specializes in working with physicians - Your feed should be filled with physicians, hospitals, medical centers, residency programs, and the issues doctors face.
3. You are an advisor who specializes in working with retirees - If your audience is ALREADY retired - then most likely LinkedIn is NOT going to be the #1 place those folks are spending their time!

Your feed should be full of your \*TARGET AUDIENCE'S\* content.

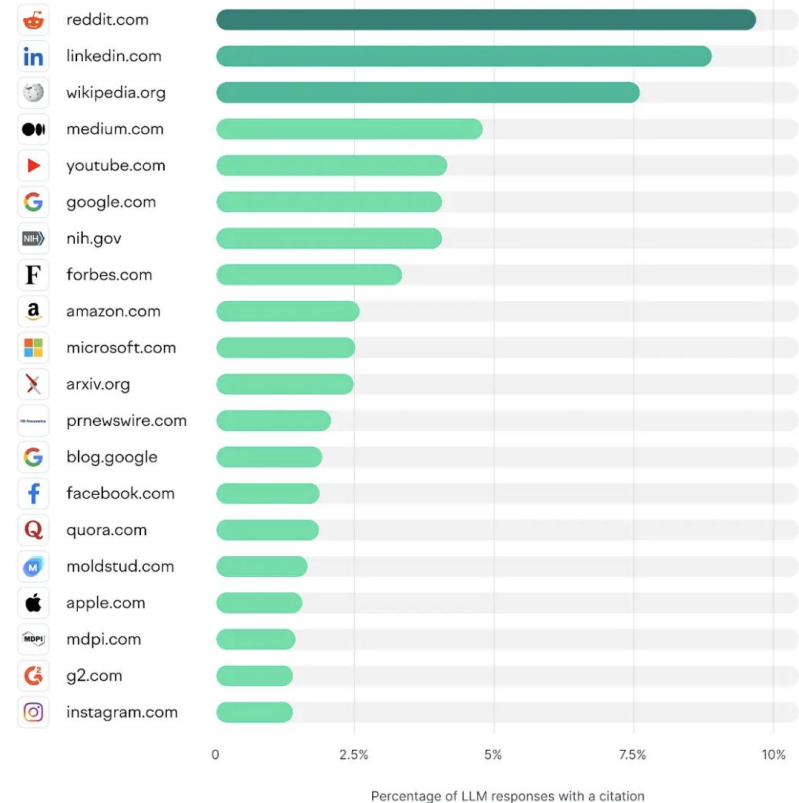
Go take a look at who you are currently following and connected to and do a quick audit to estimate what % of those folks are your target prospects. If it's not at least 60% - you have some work to do!

Oh and just a reminder - If you need help simplifying this and figuring out how to find the right people to connect with- I hosted an Advanced LinkedIn Strategies

**A strategic LinkedIn  
presence is now crucial**

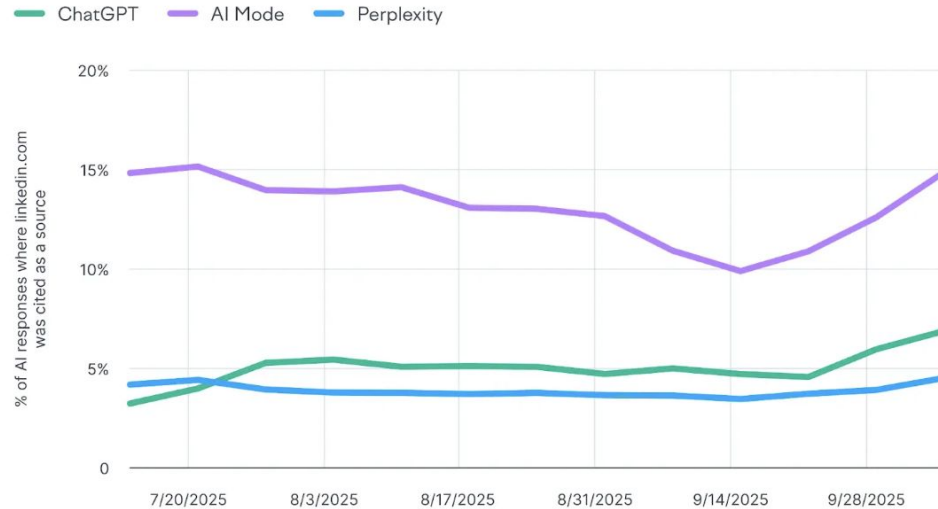
**(beyond networking &  
prospecting)**

## Top Cited Domains on LLMs (ChatGPT, Google AI Mode, Perplexity): October 2025



# LinkedIn: Steady Rise Across All Platforms

## % of AI Responses with a LinkedIn Citation



Based on a Semrush study of 230K prompts conducted in October 2025

# 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.



Michael Murray, AIF®, CPFA · 1st

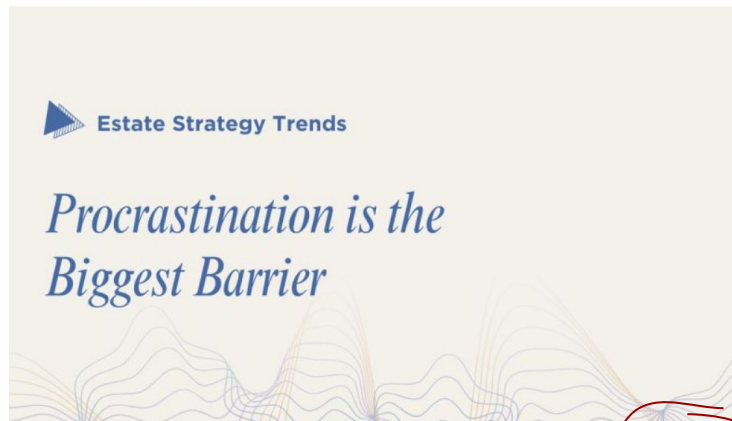
Guiding Families & Business Owners to Financial Freedom | Fiduciary Ad...

1mo · 🌐

Procrastination is a top reason people haven't created a will or trust since 2022, with men slightly more likely to delay estate management than women. Even fewer are taking action this year, with 43 percent of those without a will admitting they "just haven't gotten around to it." In 2025, only 24 percent of survey participants reported having a will, and 4 percent mentioned other estate management documents, a decline from 33 percent with a will in 2022. Time to get it in gear! #Procrastination #EstateStrategy

Source: [Caring.com](https://www.caring.com) February 18, 2025

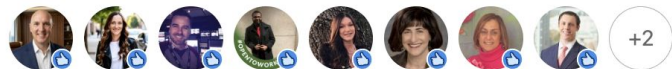
<https://lnkd.in/e63FywhC>



Michael Murray, AIF®, CPFA and 9 others

6 comments

Reactions



Like

Comment

Repost

Send

## 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 & boosts reach significantly.
- If you want engagement, YOU have to engage!

**Daniel Crosby, Ph.D.** · 1st  
Chief Behavioral Officer at Orion Advisor Solutions  
6d · 🌐

Lie: Money is the only type of wealth.

In reality, there are 5 types of wealth:

- Financial (money)
- Social (relationships)
- Physical (health)
- Mental (knowledge, faith)
- Time (freedom)

The pursuit of financial wealth can rob you of the others.

Don't let that happen.

- via [Sahil Bloom](#)

👍❤️🔒 Steve Gresham and 1,066 others · 70 comments · 73 shares

Reactions

👍👍👍👍👍👍👍👍👍

👍 Like · 💬 Comment · ➦ Share · ✉️ Send

Add a comment...

Most relevant ▾

**Samantha Russell** · You  
Chief Evangelist at FMG Suite & Twenty Over Ten | Investment New...  
6d · ⋮

The origin of the word "wealth" comes from Old English "wele" & originally meant "well-being"

Before taking on connotations of \$, wealth referred to the welfare of people; their general happiness and joy.

"Wealth" means a lot more than just money. It always has - we just forgot!

Like · 🌐❤️🔒 59 · Reply · 3 Replies

# LinkedIn Events

The best lead generation strategy  
that almost no one uses....



fmg

TUESDAY, APRIL 21ST AT 10 AM PT | 1 PM ET



## What's *Actually* Working for **Financial Advisors** on **LinkedIn** Right Now

[Sign Up Now →](#)

SPEAKERS



**Samantha Russell**  
Chief Evangelist  
FMG



**Susan Theder**  
CMO & CXO  
FMG

Today, 7:00 PM

### What's Actually Working for Financial Advisors on LinkedIn Right Now

Event by FMG



Tue, Apr 21, 2026, 7:00 PM - 8:00 PM (your local time) [Add to calendar](#) ▾



Online



[https://info.fmgsuite.com/whats-actually-working-for-financial-advisors-on-linkedin?utm\\_campaign=42072724-FMG-WN-P-What%E2%80%99s%20Working%20on%20LinkedIn%20Wksp%204-21-2026&utm\\_source=linkedin&utm\\_medium=social&utm\\_content=FMG](https://info.fmgsuite.com/whats-actually-working-for-financial-advisors-on-linkedin?utm_campaign=42072724-FMG-WN-P-What%E2%80%99s%20Working%20on%20LinkedIn%20Wksp%204-21-2026&utm_source=linkedin&utm_medium=social&utm_content=FMG)

# How to Use LinkedIn Events

## Tips for LinkedIn Events

- **First, create your webinar on Zoom**
- Create an event for each individual webinar
- You can invite people directly FROM linkedin and they register on LinkedIn too
- Connected to 500 Nike employees? Filter and invite them all
- Still Use Zoom to Host

## Past events



Tue, Nov 5, 2024, 7:30 PM

**Tax-Savvy Diversification Strategies: For Microsoft Employees**



Isaac Presley, CFA and 124 other attendees



Tue, Dec 3, 2024, 9:00 PM

**3 Steps to Understand the Risk & Maximize Your Intel SERPLUS Account**



Isaac Presley, CFA and 20 other attendees



Thu, Mar 21, 2024, 8:00 AM

**Unlocking Tax Savings: Expert Strategies for Intel Employees in 2024**



Isaac Presley, CFA and 12 other attendees



Wed, Mar 20, 2024, 8:00 PM

**Unlocking Tax Savings: Expert Strategies for Nike Employees in 2024**



Isaac Presley, CFA and 12 other attendees



Tue, Mar 19, 2024, 8:00 PM

**Unlocking Tax Savings: Expert Strategies for Microsoft Employees in 2024**



Isaac Presley, CFA and 32 other attendees

# The Best Part: Promote Event without Emails of Prospects

→ **Copy Link** — You can send connection request + link to ANYONE

→ **Invite** — Any admins can send invites directly to their 1st degree connections.

→ **Send in Message** — You can send the invite as a message to any of the admins' connections

The screenshot shows a LinkedIn event page for 'What's Actually Working for Financial Advisors on LinkedIn Right Now' by FMG. The event is scheduled for today from 7:00 PM to 8:00 PM and is online. A context menu is open over the 'Copy link' option, showing other actions: Invite, Boost, Repost to Feed, Send In Message, X (formerly Twitter), and Facebook. The page also features sections for 'Review event best practices', 'Boost event', 'Analytic highlights', and 'Event Speakers'.

**Review event best practices**  
Get proven tips to make sure your event runs smoothly from start to finish. [View](#)

**Boost event**  
Reach more people by boosting your event. [Boost](#)

**Analytic highlights**  
Review key performance highlights from your event.

Registrations	Event page visits	Engagement rate
8 ▲ 33.3% last 7 days	9 ▲ 80.0% last 7 days	4.2%

[Show in-depth analytics →](#)

**Event Speakers**  
Stay connected with your speakers to ensure event success. [✎](#)

**Susan Theder** · 1st  
HealthManagement.com CMO of the Year  
Top 50 Women CMOs of 2025 - Women We  
Want to Watch | ThinkAdvisor  
Member  
Boston, Massachusetts, United States  
Susan and 970 other mutual connections  
[Message](#)

**Russell**   
How advisors grow & enterprises scale through marketing strategies  
(ask)  
Marketing | Chief Evangelist @ FMG | Follow for daily marketing tips  
Philadelphia, Pennsylvania, United States  
Nadia and 14,330 other mutual connections  
[View event network →](#)

Footer: [About](#) [Privacy & Terms](#) [Ad Choices](#) [Advertising](#) [Business Services](#) [Get](#)

# Content that Makes AI Recommend You

## Discovery

What should I look for in a financial advisor for someone with \$5M+ in assets?

### Key advisor qualifications

For high net worth clients, these credentials and structures matter most

Factor	Why it matters
Fee-only / fiduciary	Legally required to act in your interest, no commission conflicts
CFP® or CFA®	Rigorous credentials in planning or investment analysis
Tax & estate	Essential at



...

## Evaluation

I have concentrated stock from an IPO and rental properties. What should I ask advisors?

Your situation involves concentrated equity risk and real estate — targeted questions:

Topic	Ask this
Concentrated stock	What strategies do you use for diversifying a single-stock position?
Real estate	How do you incorporate illiquid assets into overall allocation?
Fee structure	What is your all-in cost, and does the fee decline



...

## Selection

Compare these 2 advisors for my situation.

	Firm A (boutique RIA)	Firm B (family office)
AUM fee	0.75%, drops above \$5M	0.85% fl includes family off svcs
Minimum	\$2M	\$5M
Tax planning	Coordinates with your CPA	In-house CPAs & estate attorneys
Stock plans	Partners with options specialist	Direct 10I managerr
Reporting	Quarterly	Real-time portal



...

## Explore search trends

Clear

🔄 Suggest search terms

● "financial advisor near me"  
Search term



📍 United States ▾

📅 2004 - present ▲

🌐 Web Search ▾

## Interest over time ⓘ

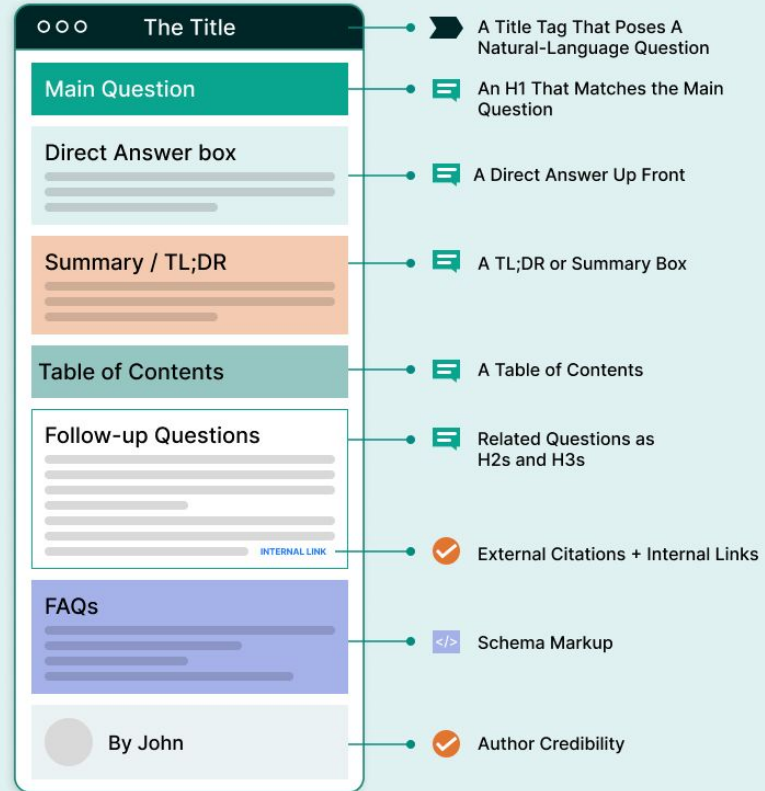
United States · 2004 - present



# 1. Add “Structured Content” To Your Website

- AI tools don't browse your website – they extract.
- They scan for clearly structured answers:
  - Q & A format
  - Short paragraphs
  - Bullets points

## The AEO-Optimized Page

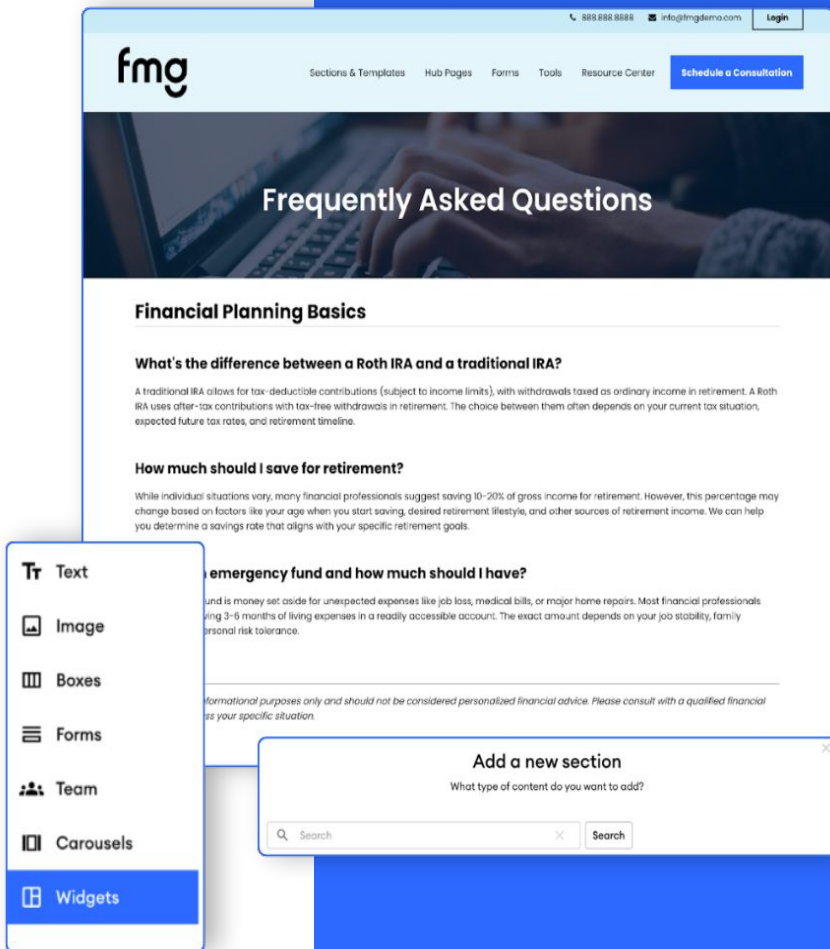




## How FMG Does This For You:

### FAQ with Built-In Schema Markup

- Helps your site show up when prospects use AI search tools
- Built-in AI-friendly structure (no setup required)
- Add optimized FAQs to any page with one click



## 2. Get Testimonials & Reviews Compliantly

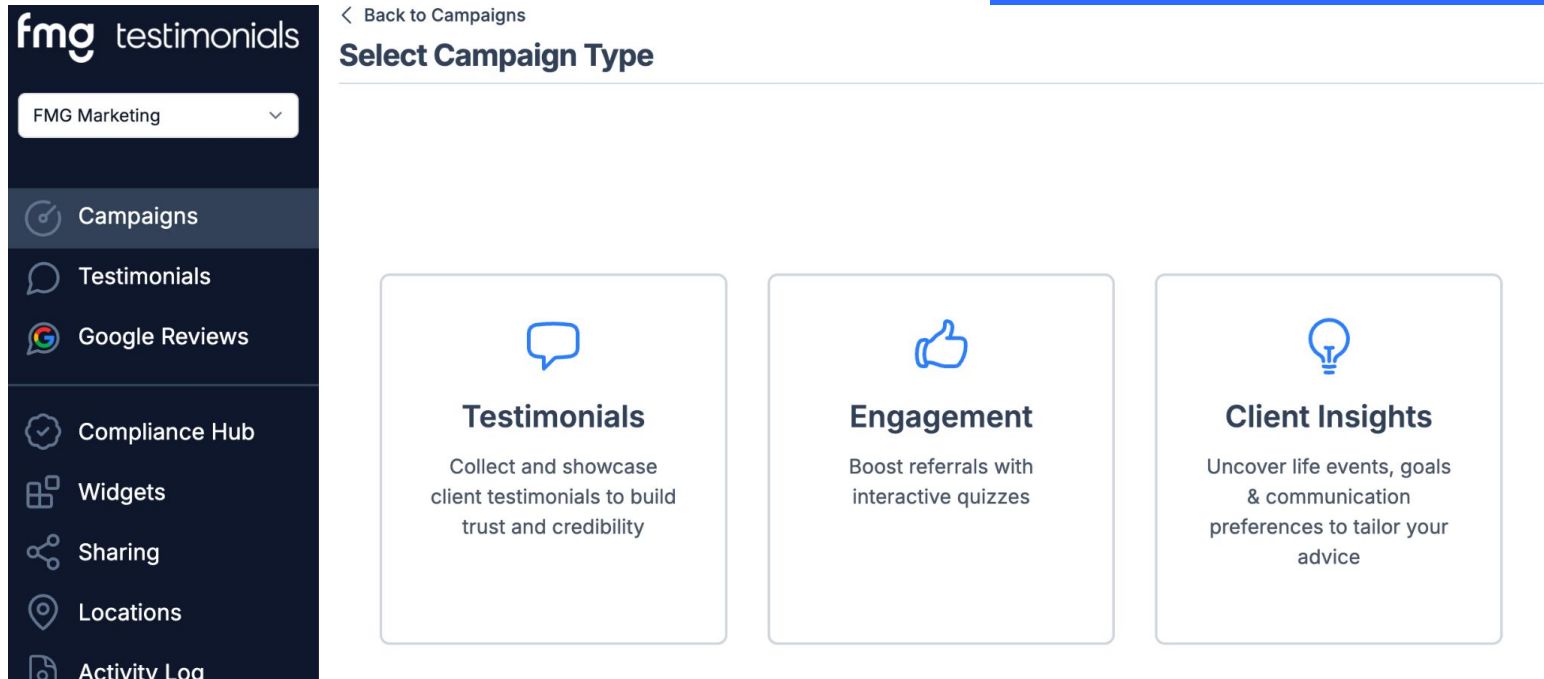
- They're one of the biggest credibility signals both AI and humans look for.
- Testimonials and reviews have a **direct impact** on your AEO visibility





## How FMG Does This For YOU:

### FMG Testimonials



The screenshot shows a mobile application interface for FMG Testimonials. On the left is a dark sidebar with the 'fmg testimonials' header and a list of menu items: 'FMG Marketing' (with a dropdown arrow), 'Campaigns', 'Testimonials', 'Google Reviews', 'Compliance Hub', 'Widgets', 'Sharing', 'Locations', and 'Activity Log'. The main content area is white and features a 'Back to Campaigns' link at the top left. Below it is the heading 'Select Campaign Type'. Three large, light-blue rounded rectangular cards are displayed in a row. Each card contains an icon, a title, and a brief description: 1. 'Testimonials' with a speech bubble icon, 'Collect and showcase client testimonials to build trust and credibility'. 2. 'Engagement' with a thumbs-up icon, 'Boost referrals with interactive quizzes'. 3. 'Client Insights' with a lightbulb icon, 'Uncover life events, goals & communication preferences to tailor your advice'.



# Launching **TODAY!** FMG Testimonials

## How FMG Testimonials Works:

- **Get Client Feedback via Automated Surveys**  
You send a short survey to collect written feedback, star ratings, and client details. Feedback is private by default and can be used internally or publicly.
- **Consistent, Repeatable Process**  
You define when survey is sent (e.g., after onboarding or annual reviews). Once set, the process runs automatically and avoids one-off or selective requests.
- **Optional Google Review Invitations**
- **Compliance Review & Oversight (Where Required)**  
Survey language, disclosures, and testimonial usage can be reviewed and approved in advance, with full audit logs and recordkeeping.

The image shows a screenshot of the FMG Testimonials dashboard and campaign configuration interface. On the left is a dark sidebar menu with the following items: Campaigns, Testimonials, Google Reviews, Compliance Hub, Widgets, Sharing, Locations, Activity Log, Notifications, Integrations, Help Center, Team Settings, Samantha Russell, and Collapse Menu. The main content area is titled 'New Testimonial Campaign' and includes a 'Form' tab, 'Email Template', and 'Done' options. Below this is a 'Feedback Form' configuration section with a 'Draft' status. The configuration includes: 'Form Styling' (Company Logo with 'Use Team Logo' and 'Use Team Icon' buttons, and an 'Upload a file' button for PNG/JPG); 'Company Name\*' (text input with 'FMG Suite'); 'Description/Company Tagline' (text input with 'The All-in-One Digital Marketing & Compliant Texting Solu'); 'Header Background Color\*' (color picker with '#2329c7'); and 'Header Font Color\*'. On the right, a preview of the testimonial form shows the FMG Suite logo, the text 'We want to hear from you. Candid feedback helps us serve you better.', a five-star rating system, and a text input field for 'Tell us about your experience'.

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fmg

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