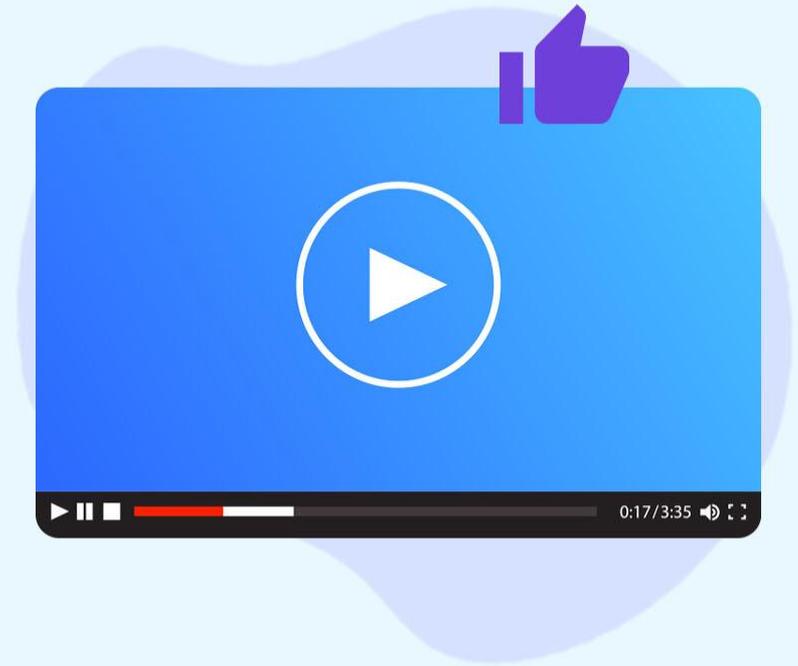




LIVE WORKSHOP:

Video Marketing Made Simple

From Setup to Success in 2025



fmg

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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

da
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 with others. 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 the least effort on your part.

w

800 | 858-251-2520

fmg

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.

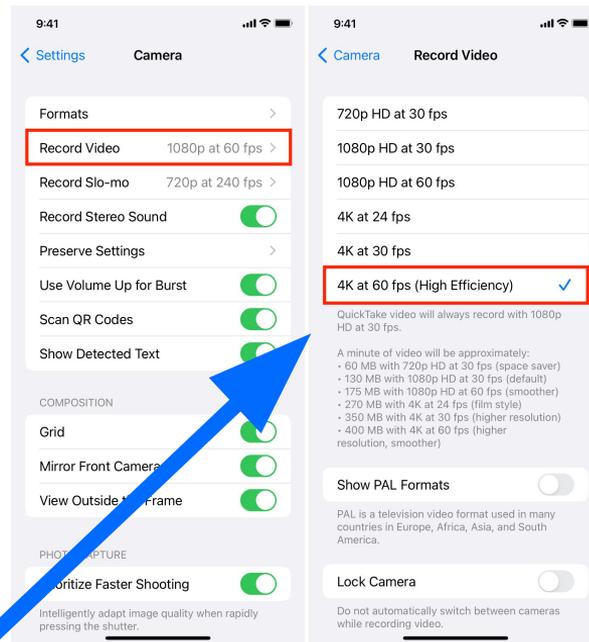
Sit in front of a window, so that you are looking into it, with the light streaming onto your face



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



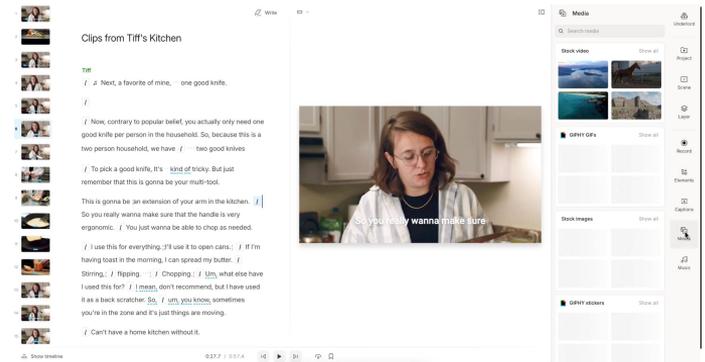
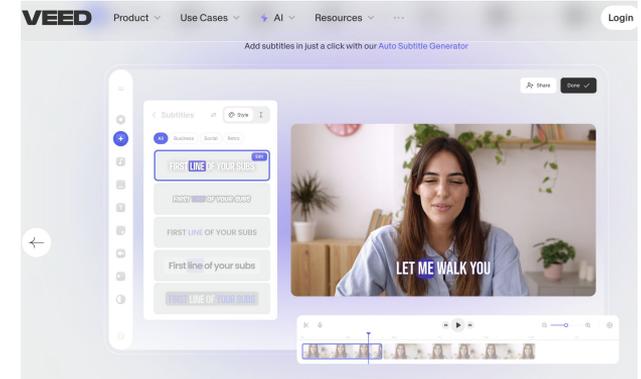
Option 2: On Your Computer

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 learn from watching the video



Samantha's **Quick Tip:**

[Start your video with a hook](#)

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" "Ultimate" "Rare" "Insane" "Secret"	"How to" "Why you should" "If you do this..." "When to" "Secret"	"Warning" "Do Not" "Stop" "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].

2 [Time frame] ago, I stopped [COMMON INDUSTRY MISTAKE]. I then achieved [POSITIVE OUTCOME].

3 10 Harsh [INDUSTRY] Truths After doing [SOCIAL PROOF/AUTHORITY].

4 Stop [COMMON INDUSTRY MISTAKE]. Instead, [USE MY SOLUTION].

5 Good [INDUSTRY SKILL] shouldn't be a mystery. It's a skill you can learn.

6 People are [CRAZY STATISTIC] after doing [POST TOPIC]. Here is the guide to nailing [POST TOPIC].

7 The best [INDUSTRY] lesson you'll receive today: [From someone who has [AUTHORITY/SOCIAL PROOF]].

8 [SUPER FAMOUS QUOTE ABOUT TOPIC]. Here is the Ultimate guide to [ACHIEVING DREAM OUTCOME].

9 [TOPIC] is not about [MISCONCEPTION]. It's about [SOLUTION].

10 The ability to [DO X] is a superpower.

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

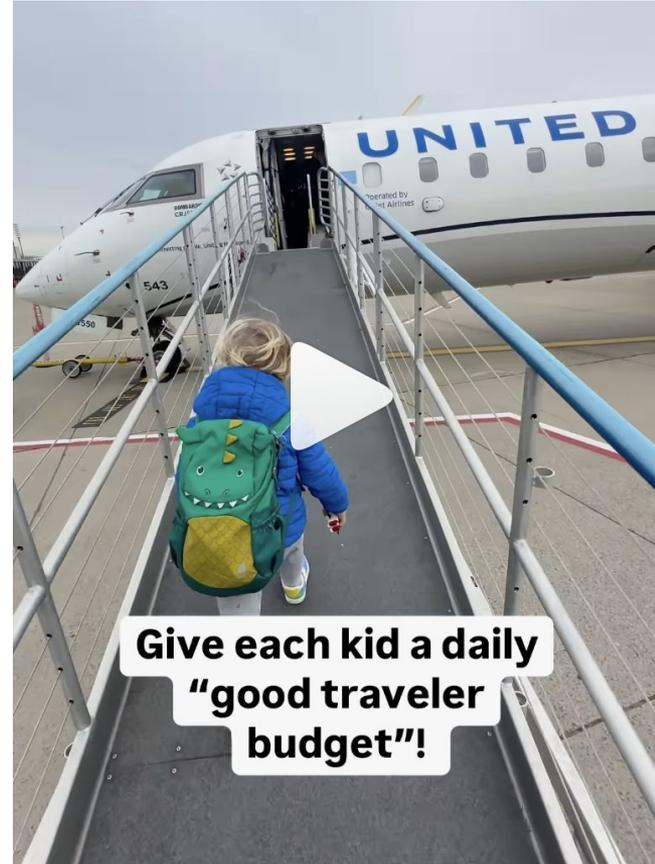
Example Hook Ideas, Part 2

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



**Give each kid a daily
“good traveler
budget”!**

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

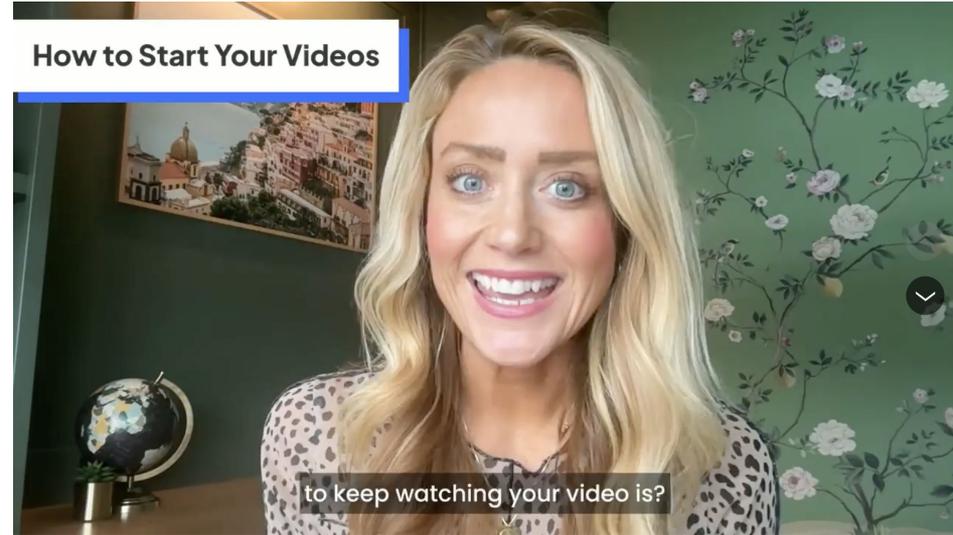
✗ My first videos were AWFUL!



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!

The screenshot displays the Veed video editing software interface. The main video preview window shows a woman speaking with large white text overlaid: "Zero Click Content" and "WHAT YOU NEED TO KNOW". A subtitle is visible at the bottom of the video: "How many times do you Google something and you get".

The "Subtitles" panel on the left shows a list of subtitle entries with their in and out times:

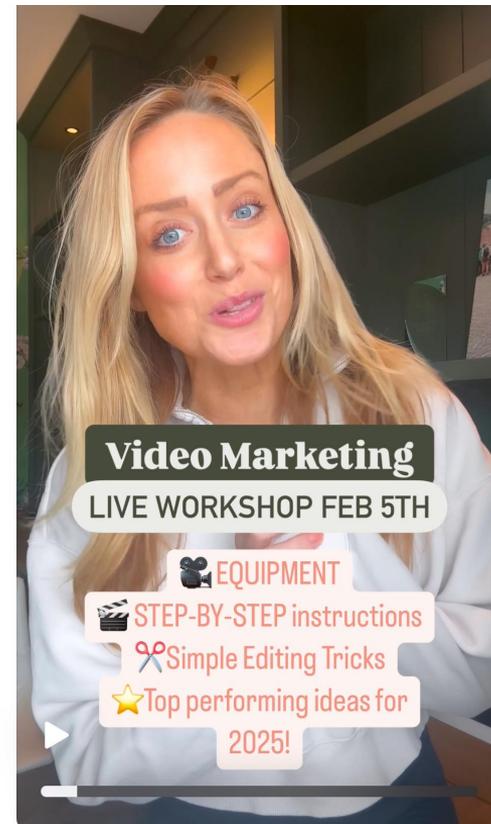
Subtitle Text	In	Out
How many times do you Google something and you get	00:04.4	00:07.7
the answer to your question without even needing to click	00:07.7	00:11.1
any website or blog to get the answer?	00:11.2	00:13.6
Google just gives you the answer	00:13.7	00:15.8
right there in the SERP.	00:15.9	00:17.2
The search engine results page page .	00:17.3	00:19.2
You might not realize, but more than two thirds	00:19.3	00:22.1
of all Google searches now end without a click.	00:22.2	00:26.4

The interface includes a sidebar with various editing tools (Settings, Media, Audio, Subtitles, Text, Elements, Record, Transitions, Filters) and a timeline at the bottom for precise editing.

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*

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?

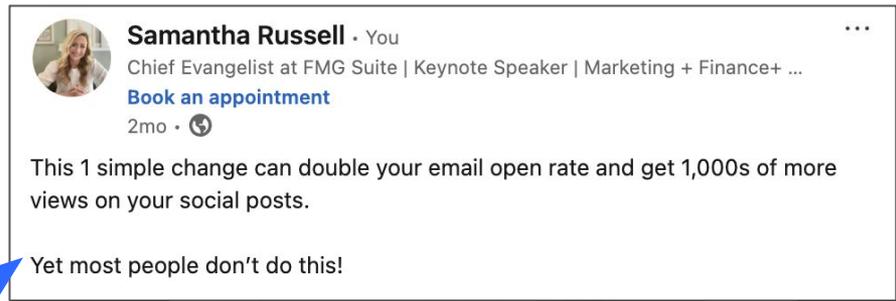
Timestamp

6

Never Mind Select Thumbnail

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, her name, title, a link to book an appointment, and a text-based hook. A blue arrow points from the text 'Yet most people don't do this!' in the video thumbnail to the 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!



How to Share Your Video: Youtube

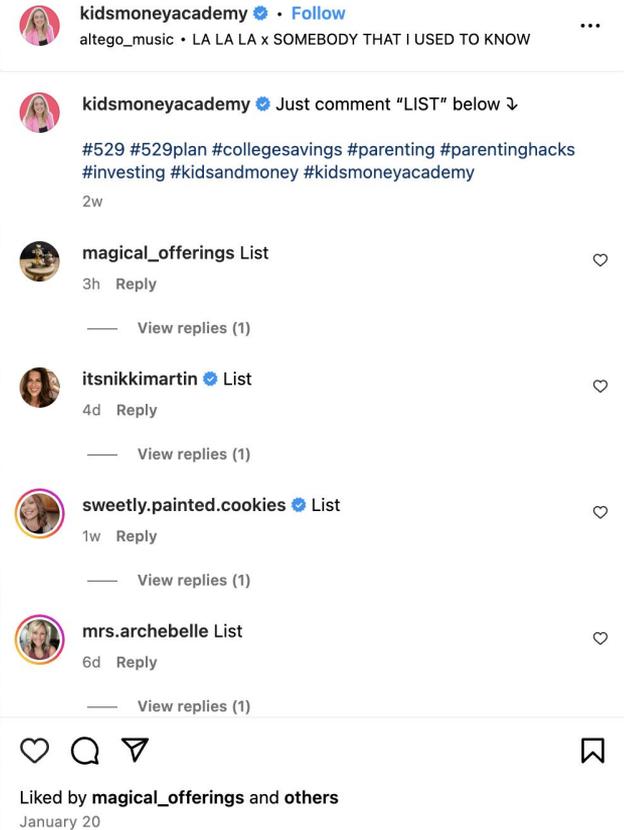
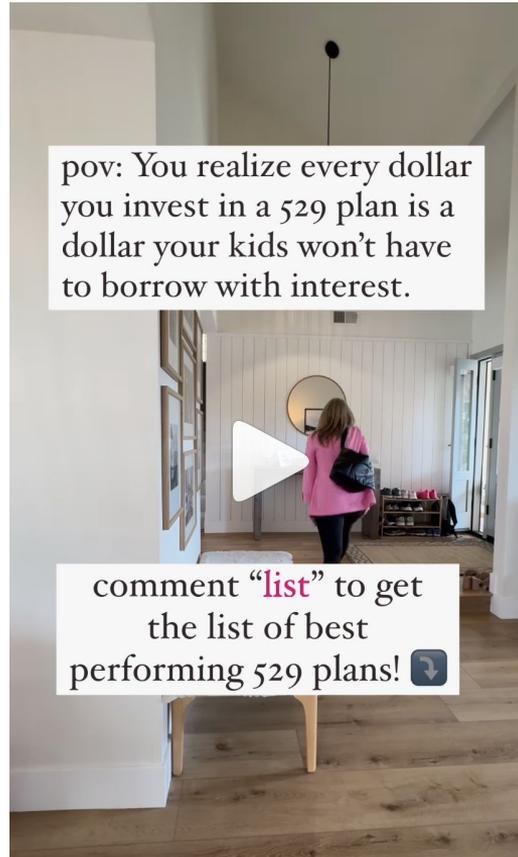
- Use TubeBuddy to help you get great SEO on your videos
- **Horizontal** for regular Youtube, **Vertical** for Youtube Shorts! for Social!

The screenshot displays the YouTube interface. At the top, there is a search bar and navigation icons for 'Create', a notification bell, and a profile icon. Below the search bar are tabs for 'Home', 'Videos', 'Shorts', 'Live', 'Playlists', and 'Community'. The main content area is divided into two sections: 'Popular videos' and 'Shorts'. The 'Popular videos' section features four video thumbnails with titles such as 'How Do the Affluent Find a New Financial Advisor?', 'Marketing for Financial Advisors in 6 Easy Steps', '7 Social Media Post Ideas Proven to Work for Financial Advisors', and 'How Your Lackluster Website is Hinder Your Firm's AUM'. The 'Shorts' section shows four vertical video thumbnails with titles like 'LinkedIn Insider Tip', 'Be Ready When the', 'Flash Kinsaid', and 'Client Event Idea'. A left-hand navigation menu includes options for Home, Shorts, Subscriptions, History, Playlists, Your videos, Watch later, Liked videos, Subscriptions, and Store.

How to Share Your Video: Instagram

- Use **REELS** to grow your audience

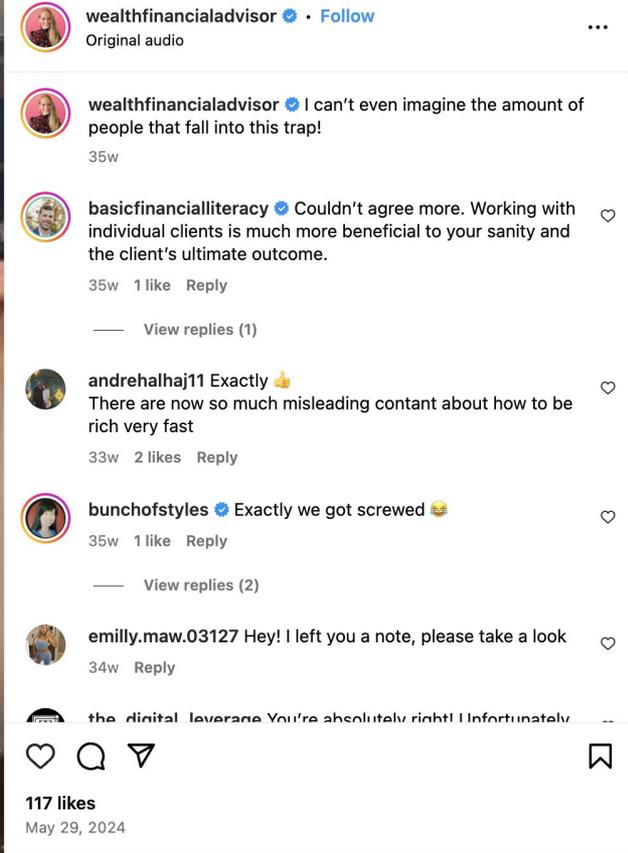
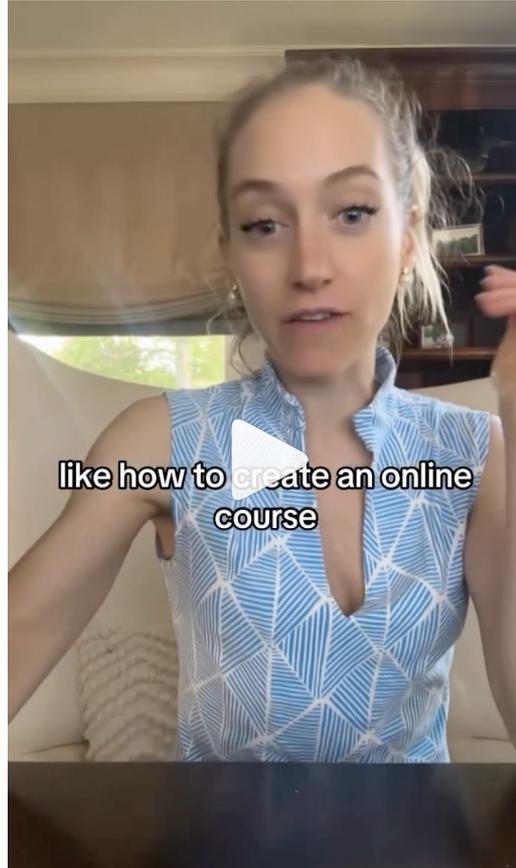
Use **STORIES** to connect with the followers you already have



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](#).



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

fmg

2025 Marketing Guide for Financial Advisors

