



# Video Checklist

Keep this checklist handy to **create professional-quality videos** without complicated equipment or a huge budget.

## Camera

- Smartphone or Webcam
  - Optional: tripod for stable recording

## Location

- Quiet, minimal background distractions, natural light source (near a window)
  - If you don't have a natural light source, purchase a ring light instead
- 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

- Outline development
  - Speak from an outline versus a word-for-word script to sound natural
- Identify any graphics/pop-ups to include
- Not sure where to start? Base your video content on existing blogs, articles, or market commentaries for inspiration and structure
- Always start with an eye-catching hook

### Hook examples:



- I've helped 100 people retire. Here's what most of them said they wish they'd done before retirement
- Before you apply for Social Security, watch this
- Scared about being bored in retirement? Try this
- If you have RSUs, avoid a huge surprise tax bill with this tax planning strategy
- If you have a net worth over \$2 million, here's what you need to know before you retire
- What NOT to do when claiming Social Security
- If you are under 45 and making \$150K or more a year, you need to know this
- Struggling with high tax bills? Watch this
- Business owner with less than 50 employees? You need to know this about getting health insurance for staff
- The absolute WORST advice about saving money for retirement



## Recording Best Practices

- Dress in 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)
- Even if you mess up, keep recording

## Editing

- Tools like [Veed](#) or [Descript](#) make it really easy to edit
- Make edits to:
  - Remove dead space at beginning/end
  - Check audio levels
  - Add subtitles
  - Add any visual elements like text to beginning/end

## 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
    - Use [Tube Buddy](#) for SEO
  - Email
    - Put {Video} in the subject line
  - Website
  - Social media

## Guide to Video Orientation

### Horizontal

- Website
- Email
- Regular Youtube

### Vertical

- Instagram Reels and Stories
- YouTube Shorts

### Both

- LinkedIn

# 300%

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



# 80%

Incorporating video on landing pages results in an 80% rise in conversion rates\*

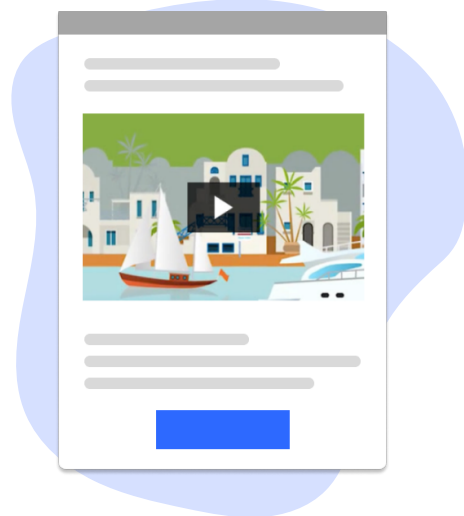




## FMG's Video Email Widget

FMG's Video Email Widget allows you to upload a video straight to an email, no need to host it elsewhere, create a thumbnail or any extra steps!

[Learn More >](#)



Somebody came back to me and said 'you know your high school looks just like my high school!' and another said 'I had this happen in my family when I was growing up and I understand what you're talking about'...There's an emotional connection that you make with folks that watch this [personal story video]. It's an interesting way to have a personal connection with others

**Joe Budd**  
Budd Wealth Management

### Free Consultation Offer:

Start transforming your marketing with a free 20-minute consultation tailored to your goals. We'll dive into your specific goals and show you exactly how we can help you achieve them—with as much or little effort on your part.

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