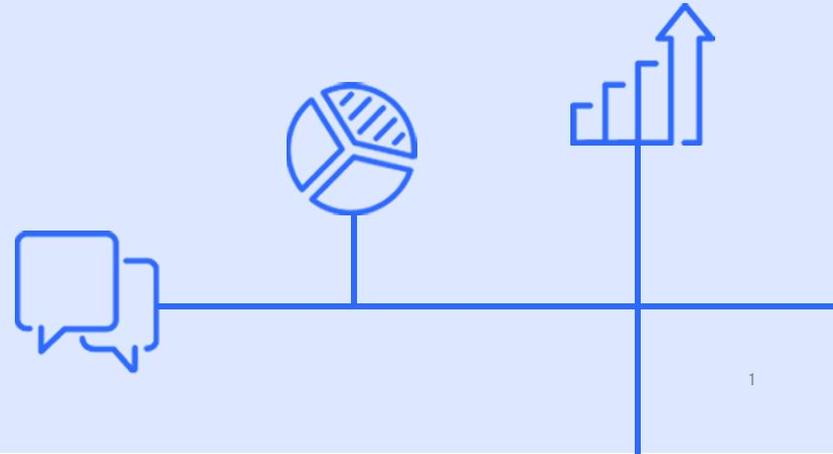




LIVE WORKSHOP:

2 Marketing Moves Advisors Need Each Month in 2026



FEBRUARY:

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



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

how important is it to have a niche for aeo

a few seconds ago

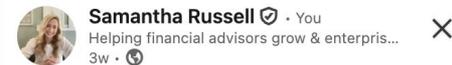
In Answer Engine Optimization (AEO), having a clearly defined niche is **critically important**. Unlike traditional SEO, which often favors broad domain authority, AEO prioritizes **specific expertise** and **topical authority**. 

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.

2. 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. Fix this first.



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

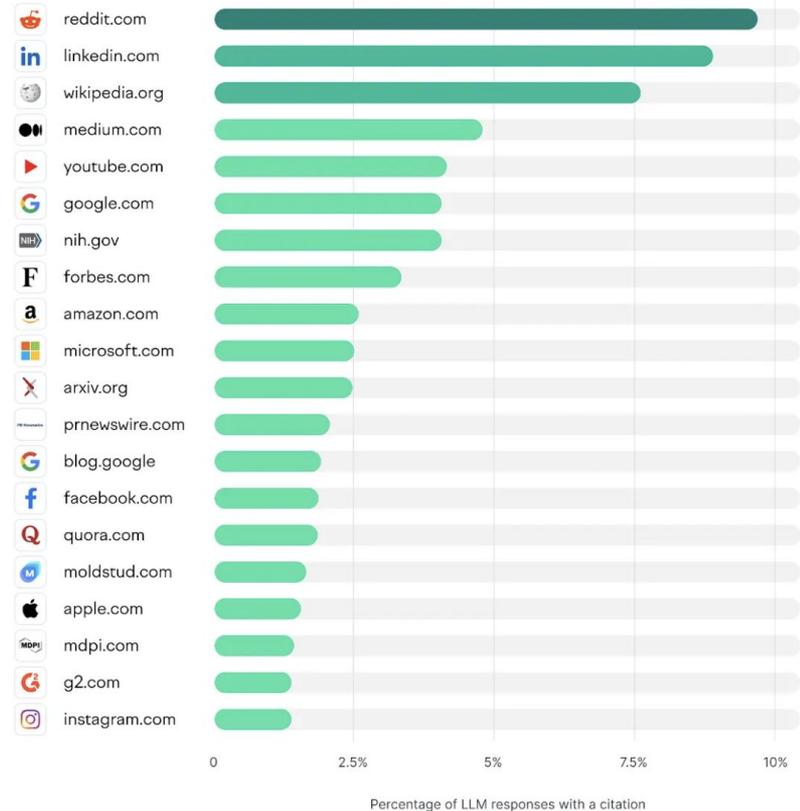
MARCH:

LinkedIn

**A strategic LinkedIn
presence is now crucial**

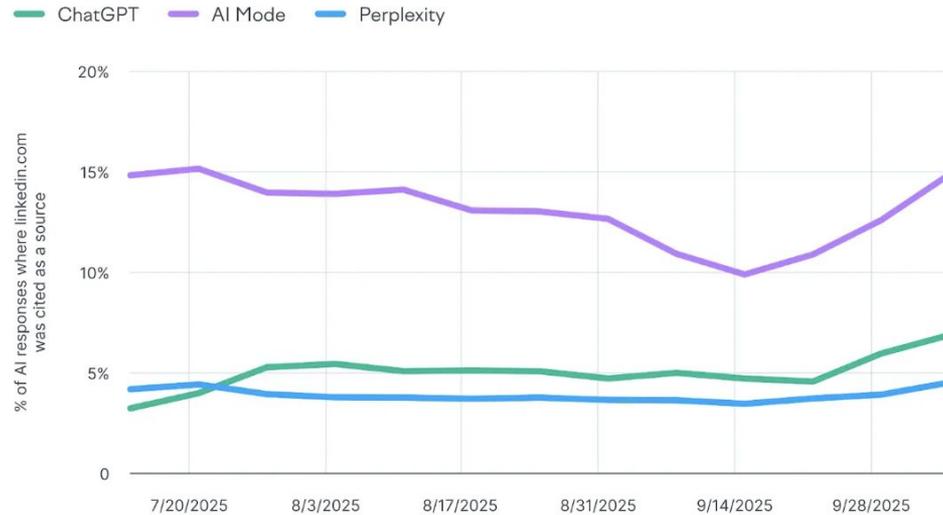
**(beyond networking &
prospecting)**

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

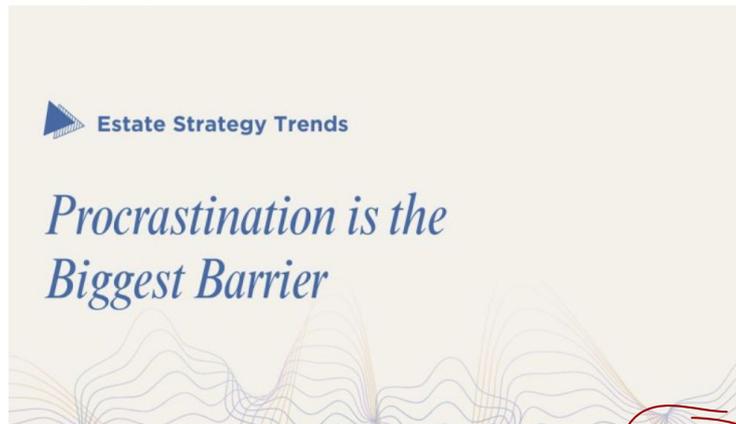
Guiding Families & Business Owners to Financial Freedom | Fiduciary Ad...

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

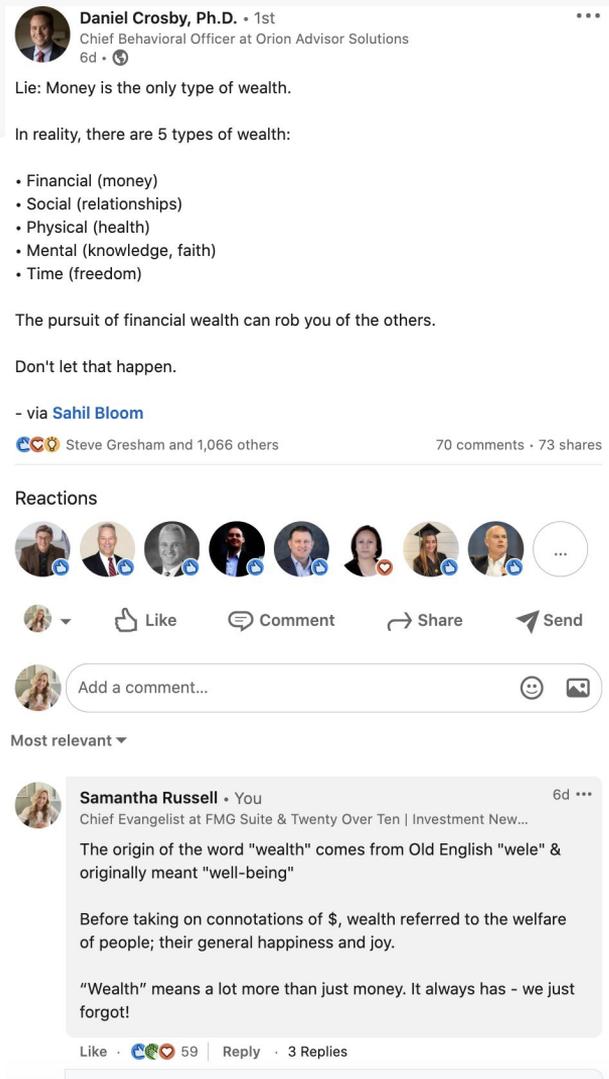
Comment

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

APRIL:

Make AI Recommend You

Explore search trends

Clear

🔄 Suggest search terms

● "financial advisor near me"
Search term



📍 United States ▾

📅 2004 - present ▲

🌐 Web Search ▾

Interest over time ⓘ

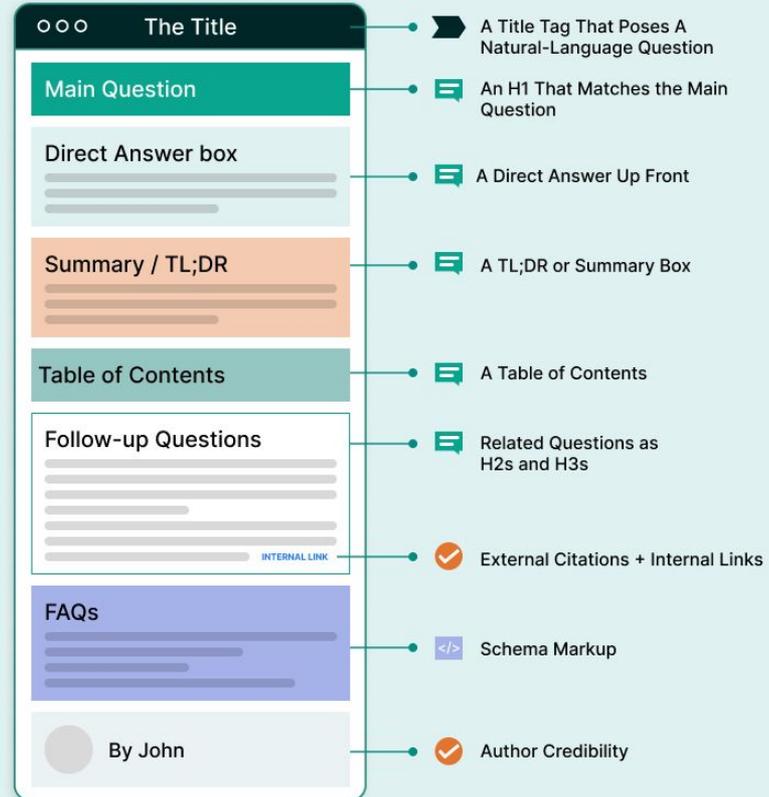
United States · 2004 - present



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

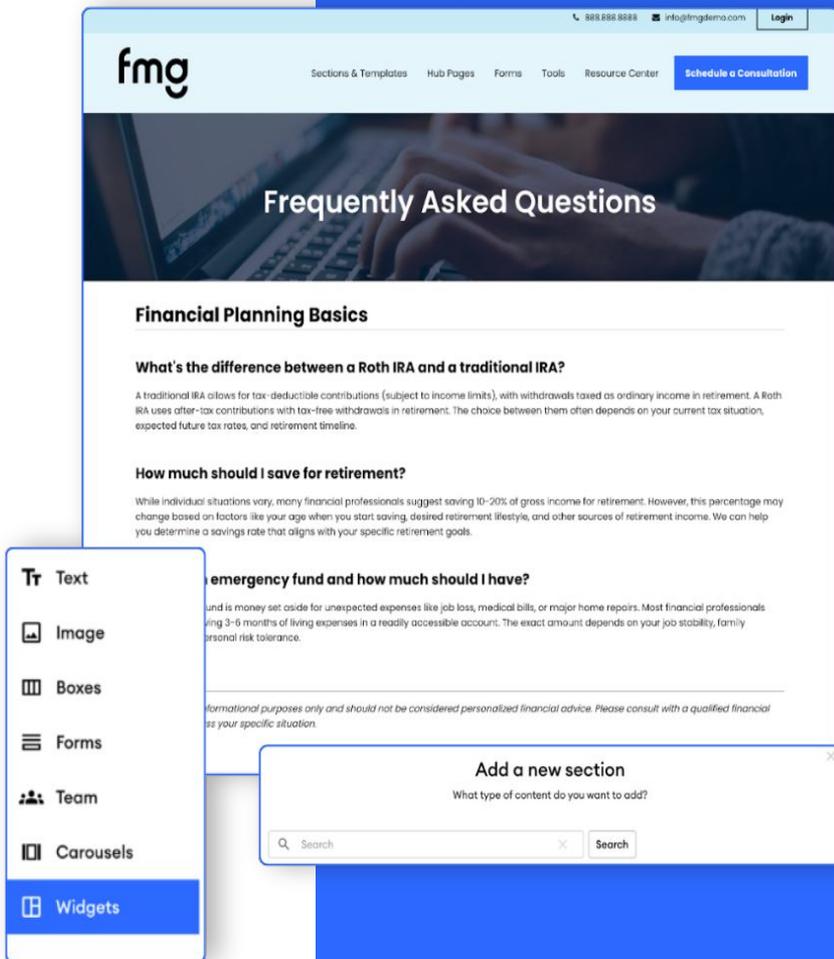




How FMG Does This For You:

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

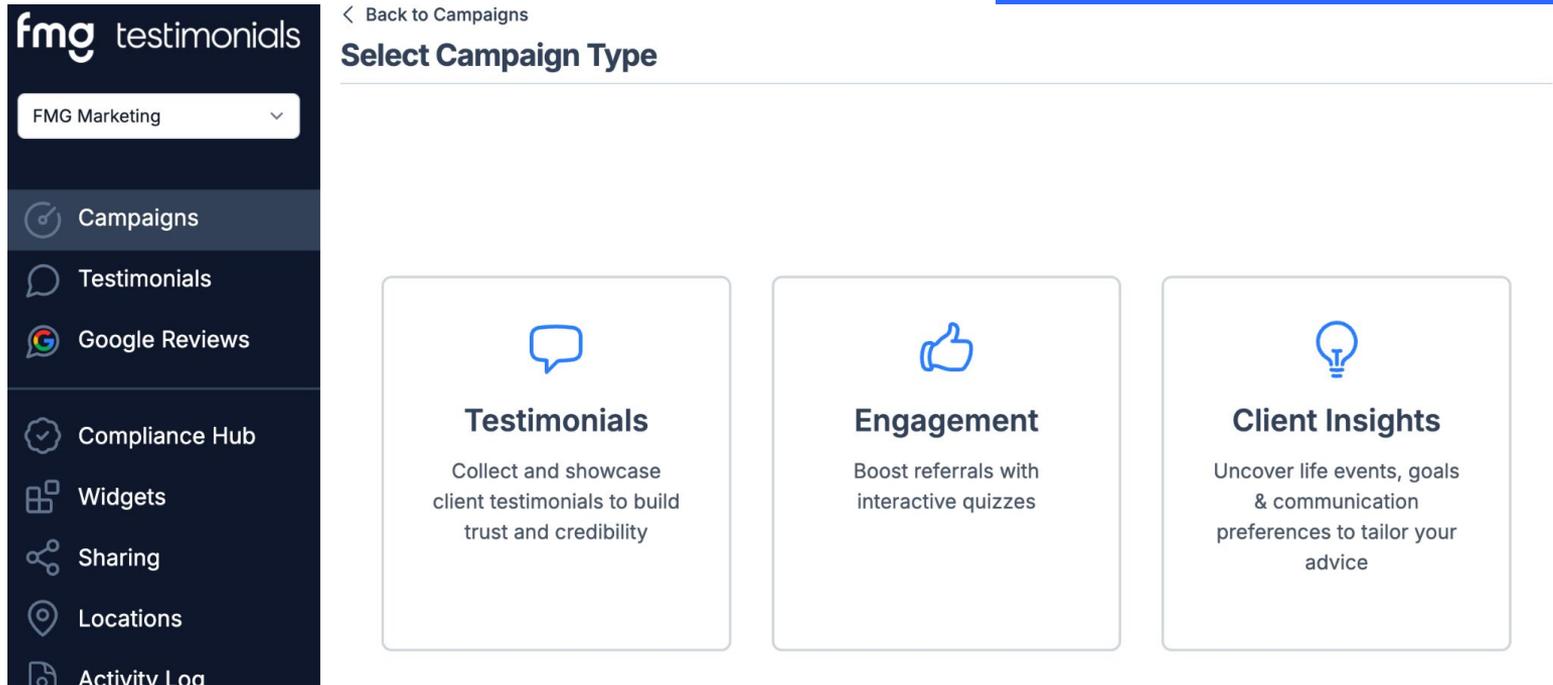
- They're one of the biggest credibility signals both AI and humans look for.
- Testimonials and reviews have a **direct impact** on your AEO visibility





How FMG Does This For YOU:

Launching TODAY! FMG Testimonials



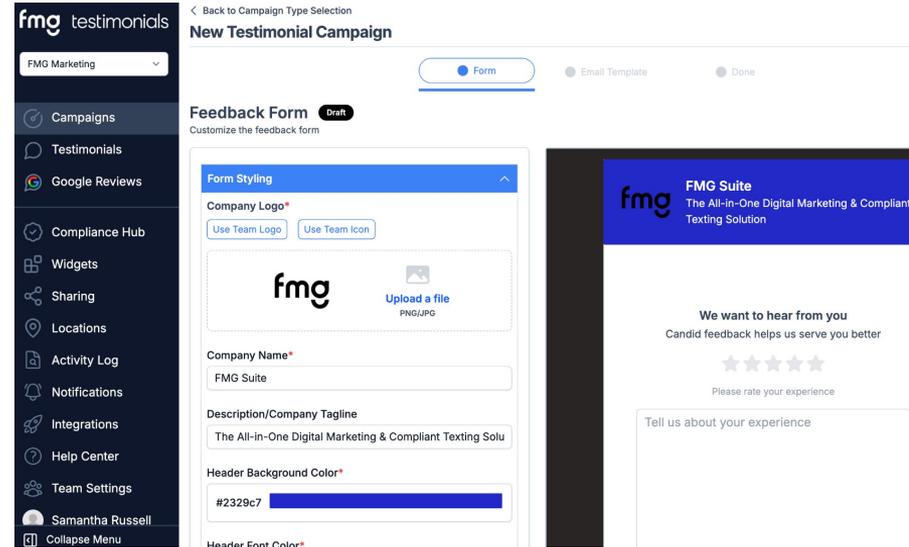
The screenshot shows the FMG Testimonials app interface. On the left is a dark sidebar with the FMG logo and 'testimonials' text. Below the logo is a dropdown menu showing 'FMG Marketing'. The sidebar contains several menu items: 'Campaigns', 'Testimonials', 'Google Reviews', 'Compliance Hub', 'Widgets', 'Sharing', 'Locations', and 'Activity Log'. The main content area is white and features a 'Back to Campaigns' link at the top left. Below the link is the heading 'Select Campaign Type'. Three cards are displayed in a row, each with an icon and text: 1. 'Testimonials' with a speech bubble icon, text: 'Collect and showcase client testimonials to build trust and credibility'. 2. 'Engagement' with a thumbs up icon, text: 'Boost referrals with interactive quizzes'. 3. 'Client Insights' with a lightbulb icon, text: '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.



MAY:

Video

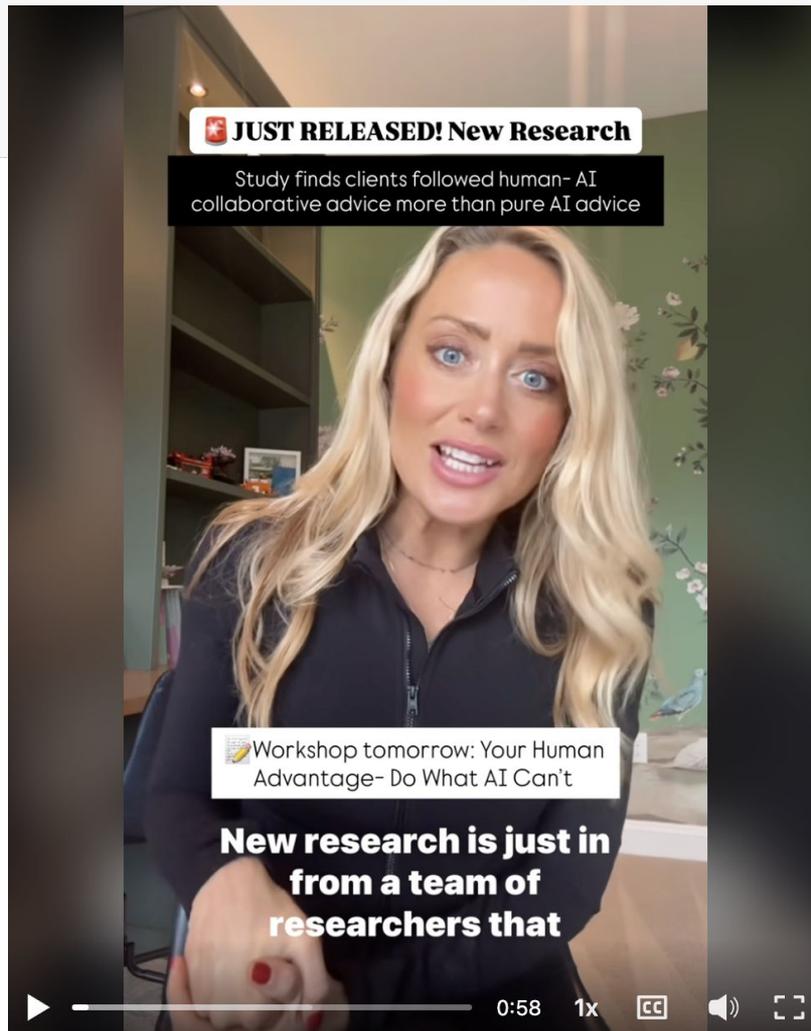
Why Video Is SO Important in 2026

- **Trust and Authenticity:** As AI content increases, authentic, human-centric video content creates genuine trust and credibility.
- **Higher Engagement:** Video outperforms static content, keeping viewers attentive for longer and driving higher CTR (up to 300% when used in email).
- **Improved Conversions:** Video acts as a powerful tool to reduce purchasing uncertainty, with 63% of consumers preferring it for learning about products.
- **"Zero-Click" Content on Social:** Video allows you to provide value directly within the feed.
- **SEO/AEO & Visibility:** Video helps boost visibility and demonstrates expertise, and trust to search engines and LLMs.

1. Start Every Video with a Great Hook

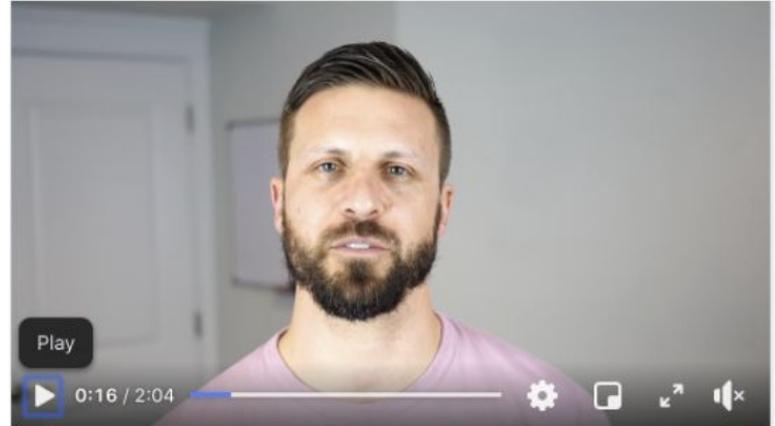
- Not "Hi, I'm Samantha." but...

"We've been working with 60/70 yr olds for 15 years. If they could go back and give their 50 yr old self advice - this is what they'd say".
- The first 5 seconds determine whether people stay or scroll.



2. Use Natural Light + Your Phone (Vertical) Desktop (Horitzonal)

- You don't need fancy equipment, but you DO need good light, good energy, and a simple outline.
- Sam likes [Veed.io](https://veed.io) if using a script/talking points!
- Record Horitzonal = email, websites or Youtube
- Record Vertical = social media

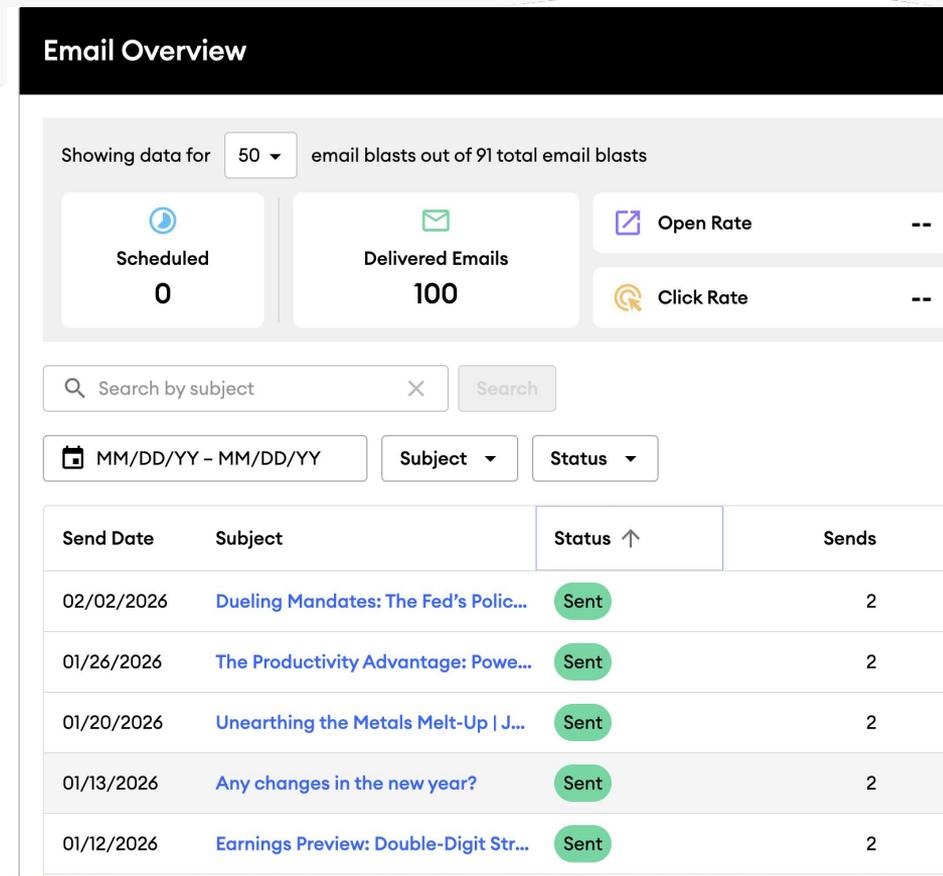


JUNE:

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.



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

^ unread

1-30 OT

-
- ☆ 📧 Russell Wealth **Help Protect Your Family from AI-Powered Scams** - Hi Samantha, Over the past few months, we've hea...
-
- ☆ 📧 Russell Wealth **Tax Prep vs. Tax Strategy: The Difference Matters More Than You Think** - Hi Samantha, With April 15 f...

JULY:

Events

1. Plan a Summer or Fall Event People will WANT to attend:

(<20% of Advisors Use Prospect Events
to Grow)

- Hire a photographer for a family picture day
- Invite an expert to join you to discuss AI Scams targeting elderly
- Events deepen relationships fast.

2. Turn Webinar Events into 10+ Content Pieces

- Post Replay to Youtube
- Email replay to clients AND prospects
- Create clips + post to Social Media
- Transcribe and turn into blog post
- Embed video to your website



9710 Monroe Street, Cockeysville, MD 21030 443-608-5490 info@kinnectadvisors.com

KINNECT
ADVISORS

About Us Our Approach Explore Services Join the Team Engage

Breaking Down the One Big Beautiful Bill Act of 2025

Breaking Down the One Big Beautiful Bi...
2025 Retirement limits

2025 Roth IRA contribution limits	
\$7,000	if under age 50
\$8,000	if age 50+ (\$1,000 catch-up contribution)
Income limitations:	
Single	\$150,000 - \$165,000
Joint	\$236,000 - \$246,000
Potential non-deductible contributions if income exceeds limit to contribute to a Roth IRA	

2025 401(k) contribution limits	
\$23,500	maximum employee elective contribution (pretax)
\$7,500	catch-up contribution age 50+ (pretax)
\$70,000	maximum contribution (after tax)
\$77,500	age 50+ (after tax)
No income limitation	

Health Care: Plan for Costs in Retirement

Source: FMG “Do It For Me” Customer Kinnect Advisors
<https://www.kinnectadvisors.com/webinar-replays>

2. FMG's "Do It For Me" Program Helps You Host Events

- We provide event idea
- Email templates
- Follow up emails
- Landing page to collect registrations
- Everything you need to know to host a successful event!

📣 Marketing Tip

[Host a "Breaking Down the One Big Beautiful Bill Act" Webinar](#)

📻 Podcast or Webinar Outline

[Breaking Down the One Big Beautiful Bill Act: What You Need to Know](#)

📄 Video Script of the Month

[Breaking Down the One Big Beautiful Bill Act: What You Need to Know](#)



Susan Theder

CMO/CXO, FMG

Samantha Russell

Chief Evangelist, FMG

Source: FMG "Do It For Me" Marketing Program

FMG Event Tool

fmg

FMG's Event Tool makes event management easy! Enjoy the flexibility of pre-built templates and customizable templates and content, and harness the power of automation and registration tracking.

[Learn More >](#)

MARKETING TOOLS



Cancel

Save Draft

Publish

Content Library

Website >

Blog >

Automated Marketing

Email >

Social >

Events ▾

Events Intro

My Events

Create Event

Create Event

Create an event based on one of the themes below, or choose a blank event to create an event that's unique to you.

Select An Event Theme

SECURE Act 2.0 Event



Tax Strategies Presentat...



Client Appreciation Event



Check-In Webinar



Shred



Event Info

Event Name *

e.g. Open House

AUGUST:

Website Optimization

The Second Half of the Year Is In Your Guide!

Stay Tuned for an invite to
Part 2 of this Workshop

fmg

The Only 2 Marketing Moves Advisors Need Each Month in 2026

If you implement even one of these marketing moves per month, your business will look completely different by the end of 2026.

This isn't a list of 22 things you need to do all at once. It's a prioritized roadmap - two specific actions per month that consistently drive organic growth for financial advisors.

February → Foundation

1. Audit your audience

- If your feed is full of other advisors, you're doing social media wrong. At least 60% of your feed should be your target audience. Fix this first.

2. Pass the 5 Second test

- Get crystal clear on your niche. When someone visits your website, they should be able to identify who you work with and what you do within 5 seconds.
- If you try to speak to everyone, you resonate with no one. Clarity is a growth multiplier.

Use this framework: "I help [WHO] to [DO WHAT], so they can [2-3 BENEFITS]."

For example: "I help business owners plan their retirement, so they can breathe easy."

March → LinkedIn

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.

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 and boosts reach significantly.

The Guide Is Coming Your Way!

All registrants will receive:

- The Only 2 Marketing Moves Advisors Need Each Month in 2026 Plan
- 2026 Marketing Guide



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

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com

