

THE **MARKETING MIX**

March 2025

3

Seasonal themes
& topics to help

**AMPLIFY YOUR
MARKETING
RESULTS**

Look inside for more tips!

Cold to Gold Framework

Social Media Prompt

Client Event Ideas

and more!

SEASONAL TOPICS

Struggling with creating informative and timely communications? Here are suggested seasonal topics. Creating content around these themes will lead to higher engagement with your audience due to their timeliness!

No time to create your own content? No problem, check out our suggested ready-to-go campaigns on Page 4.



Financial Spring Cleaning



CFP Awareness Month



Women's History Month

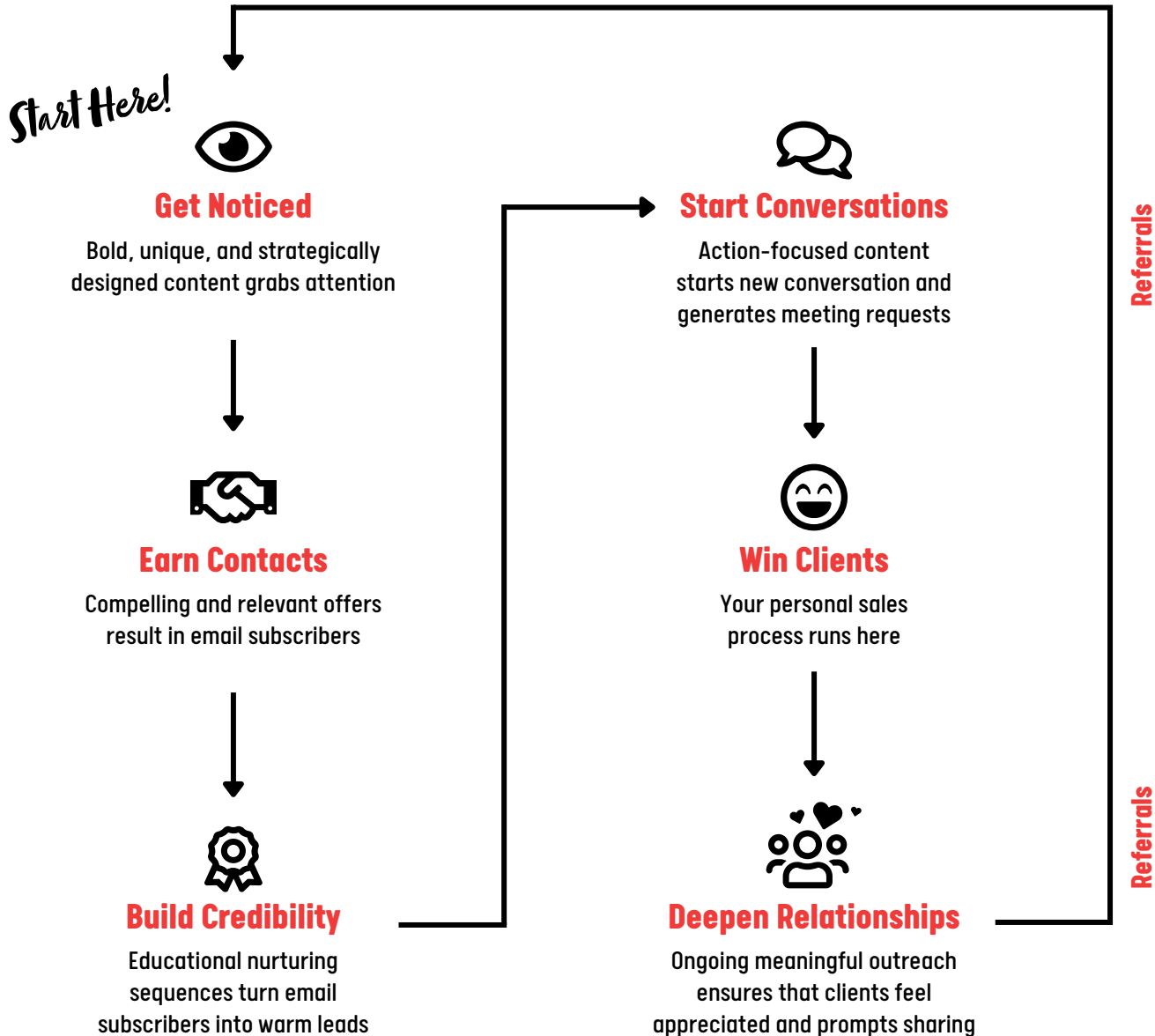
Achieve better results with a **COMPLETE STRATEGY**

The Cold to Gold framework

The **Cold to Gold Framework** is our proven strategy to help you take your prospects and turn them into clients.

The campaigns in this Marketing Mix fit into various positions within the framework to help you create a robust marketing experience for your clients and prospects.

Match up the icons below to the campaigns within the mix!



4 CAMPAIGNS

to *jumpstart* the month

With such robust content to sift through every month, we'd like to give you our top picks. You can launch these on your own or with us in a Launch It! Marketing Mix Session.

[Register here](#)

COLD TO GOLD

Just a little reminder ;)



Get Noticed



Earn Contacts



Build Credibility



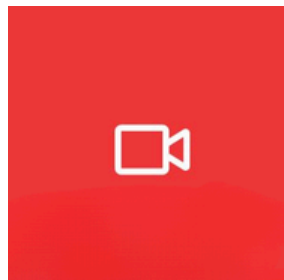
Start Conversations



Win Clients



Deepen Relationships



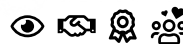
For CFP® Professionals Only
Personal Connection Video



Timely Emails
Launch as soon as possible



Creating Multigenerational Wealth: Strategies For Each Generation
Visual Insights Newsletter



OR



Financial Spring Cleaning
Visual Insights Newsletter



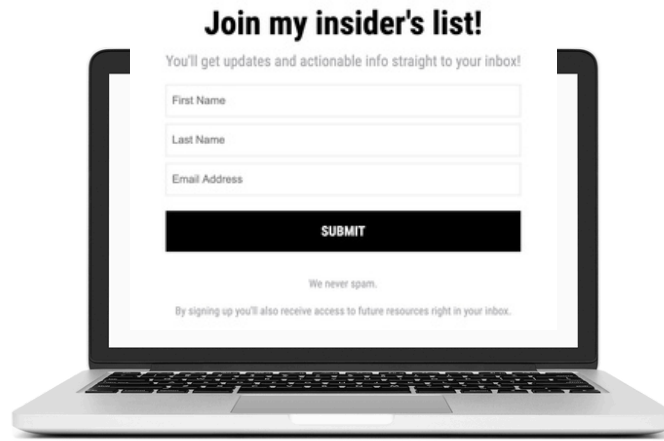
Let's start with the **ESSENTIALS**

Set yourself up for success by making sure you've launched these campaigns.
Consider these campaigns your bread and butter when it comes to your marketing.

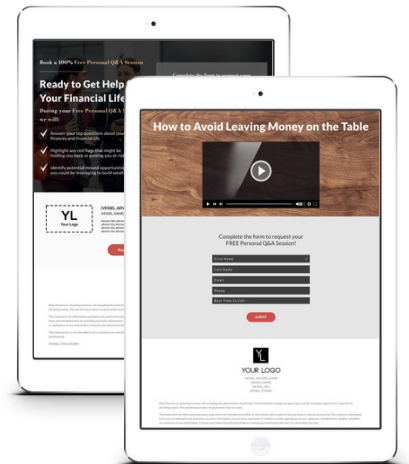
90-Day New Client Onboarding



Website Opt-in Form



8-Week Prospect Nurturing Campaign (with or without video)



Coming Soon!

You won't want to miss these dropping in the following weeks.



New Client Event Campaign
Prospect Engagement Campaign



Building Your Business Legacy: Strategies for Leadership, Succession, and Growth
Visual Insights Newsletter

GET SOCIAL!

Marketing doesn't start and end with automation. Personal posts are still critical to building those connections.

To do: Fill in the blanks to help you get started with a social media post. Post alongside a picture of your office, a selfie of you in your favorite spot, or an image that invokes inspiration (think sunset, beach, etc.)

Social Media Prompt of the Month:

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Post this anytime in March

Spring isn't just for tidying up your home—it's the perfect time to declutter your finances too! Take a moment to review your budget, investments, and long-term goals. Need a second set of eyes? Let's chat!



Post this on International Women's Day - Mar 8

Today is International Women's Day! A time to celebrate the women who inspire us, challenge us, and shape the world for the better. I'm always in awe of [SIGNIFICANT WOMAN] for [TRAIT OR ACHIEVEMENT]. Who do you honor in your own life and community today? Which women from history inspire you?



Post Pairings

Find an accompanying stock image or personal photo to go along with these social post ideas!

Want to level-up?

Drop a video and send a personal message instead.

- Employee Appreciation Day - Mar 7
- Daylight Savings - Mar 9
- Purim - Mar 13-14
- Pi Day - Mar 14
- St. Patrick's Day - Mar 17
- Spring Equinox - Mar 20

GATHER 'ROUND

Check out these ideas and use our **Event Planning Checklist** in the library to help plan your next event.



St. Patrick's Day "Luck vs. Strategy" Event

Show clients that wealth isn't about luck—it's about smart planning. Debunk financial myths, share investing strategies, and highlight the power of long-term decisions over quick wins.

Keep it fun with themed refreshments, interactive discussions, and a lighthearted quiz or giveaway (maybe gold chocolate coins or a book on investing). A great way to connect, educate, and prove that strategy always wins!

Women & Wealth Roundtable

Foster meaningful conversations on financial empowerment by bringing together female clients and prospects to discuss wealth-building, investing with confidence, and long-term security.

Feature a guest speaker or expert to offer insights on women's unique financial challenges. Create a relaxed setting with light refreshments for networking and open dialogue. A great way to strengthen client relationships, provide financial education, and inspire women to take charge of their financial futures.



MARCH MARKETING CALENDAR

See when each of your emails + social posts are scheduled on your Marketing Hub Calendar!*

Monday	Tuesday	Wednesday	Thursday	Friday
3	4	5	6	7
10	11	12	13	14
17	18	19	20	21
24	25	26	27	28
31				

*Marketing Hub availability on enterprise platforms is dependent on enterprise approval.