

THE **MARKETING MIX**

April 2024

2

Seasonal themes
& topics to help

**AMPLIFY YOUR
MARKETING
RESULTS**

Look inside for more tips!

Cold to Gold Framework | Social Media Prompt | Suggested Calendar | and more!

FEATURED THIS MONTH

Struggling with choosing informative and timely communications? Here's one super easy approach that will help: Seasonal topics and themes. Check out these suggestions:



Financial Literacy Month



Behavioral Finance

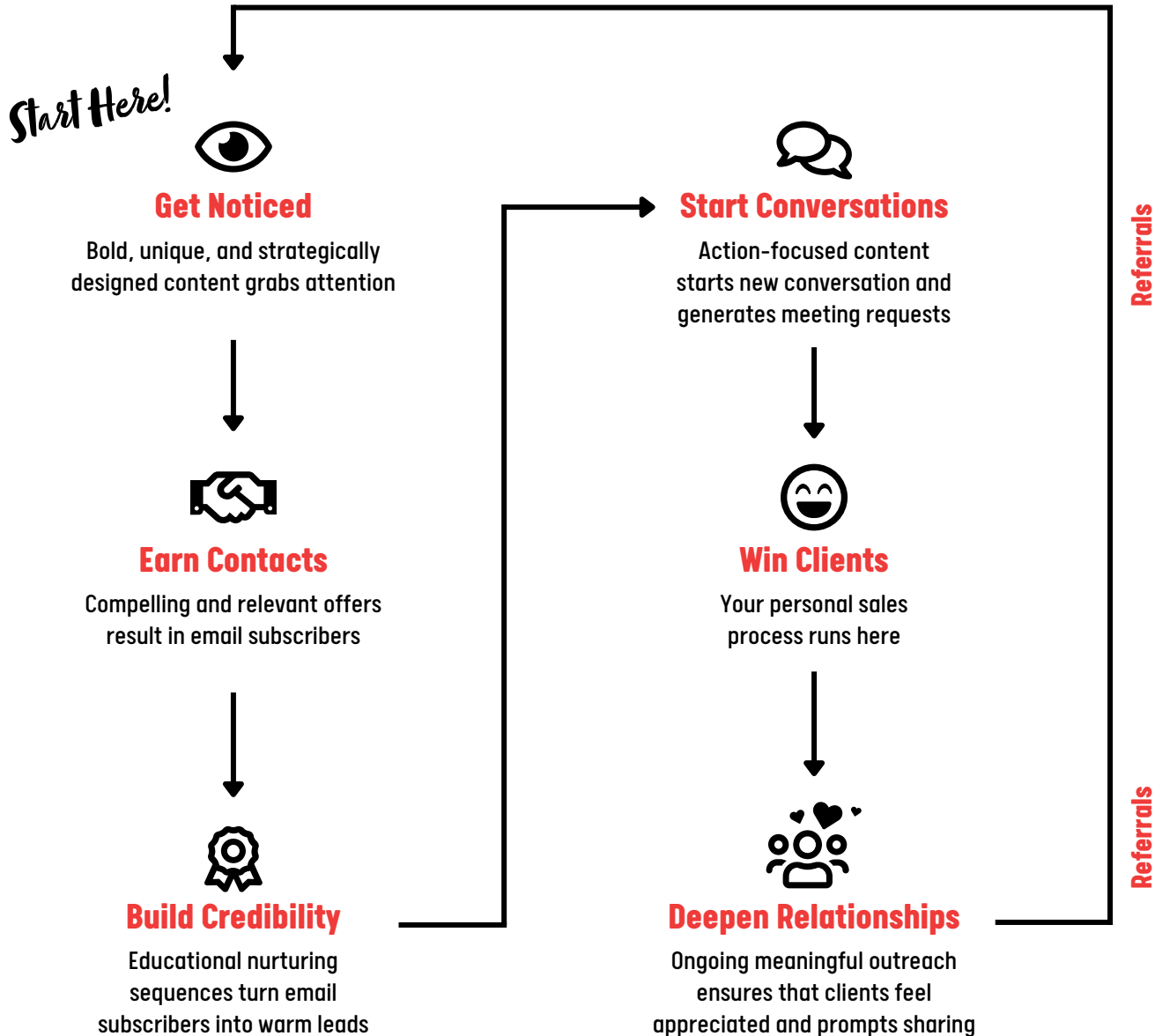
Achieve better results with a **COMPLETE STRATEGY**

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!



5 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.

COLD TO GOLD

Just a little reminder :)



Get Noticed



Earn Contacts



Build Credibility



Start Conversations



Win Clients



Deepen Relationships



2024 Q1 Financial Update
Releasing in April



Managing "Headline" Stress
Personal Connection Video



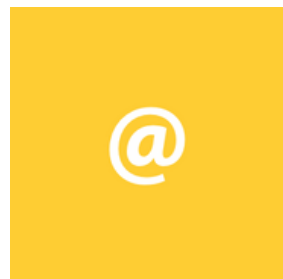
5 Common Behavioral Biases
Visual Insights Newsletter



OR



Financial Literacy Quiz
Visual Insights Newsletter



Timely Emails
Launch as soon as available



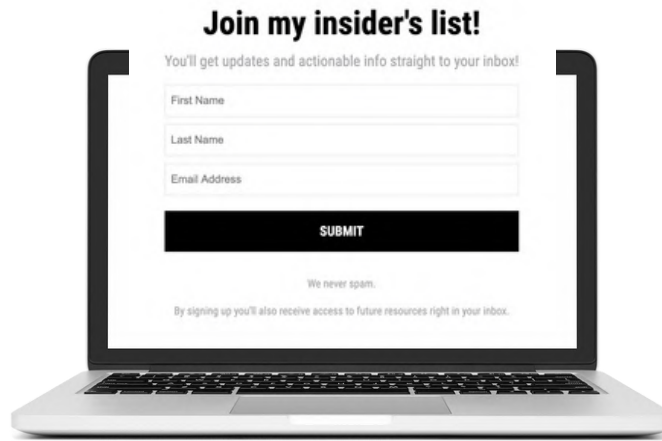
Let's start with the ESSENTIALS

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.

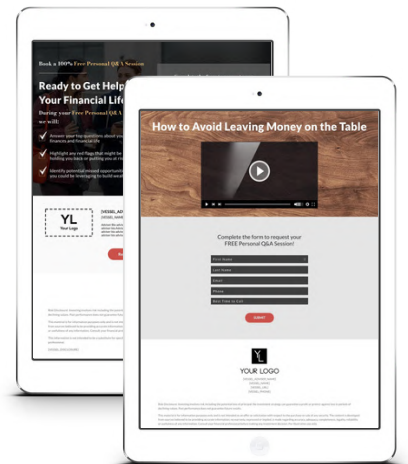
90-day New Client Onboarding



Website Opt-in Form



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



Coming Soon!

You won't want to miss these dropping soon.



3 Mindset Shifts that Could Change Your Retirement
Personal Connection Video



Plant the Right Seeds this Spring
Visual Insights Newsletter



Q1 2024 Financial Update
Quarterly Financial Update

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 on Tax Day - April 15th

Happy Tax Day, everyone, we made it! Was this tax season a breeze for you, or were you racing against the clock? Remember, it's not just about how much you make, but how much you keep. Tax-efficient strategies can help you keep more of your hard-earned money. Send me a message if you'd like to learn more to be prepared for next year!



Post any day in April for Stress Awareness Month

Did you know that April is Stress Awareness Month? Stress knows no boundaries - it can affect anyone, regardless of age, gender, or background. In the midst of life's many challenges and uncertainties, I'm making a conscious effort to pause and prioritize my mental health regularly. One of my favorite ways to destress is [describe your favorite way to destress]. How do you prefer to unwind after a long day, week, or even month?



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.

- Financial Literacy Month
- Stress Awareness Month
- Easter Monday - April 1
- April Fools - April 1
- Eid al-Fitr - April 10 (expected)
- Tax Day - April 15
- Passover - April 22 - April 30

APRIL MARKETING CALENDAR

Monday

Tuesday

Wednesday

Thursday

Friday

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