

# THE **MARKETING MIX**

June 2024

# 3

Seasonal themes  
& topics to help

**AMPLIFY YOUR  
MARKETING  
RESULTS**

*Look inside for more tips!*

**Suggested Campaigns | Social Media Prompts | Customizable 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:**



**Millennials**



**Retirement**

Achieve better results with a

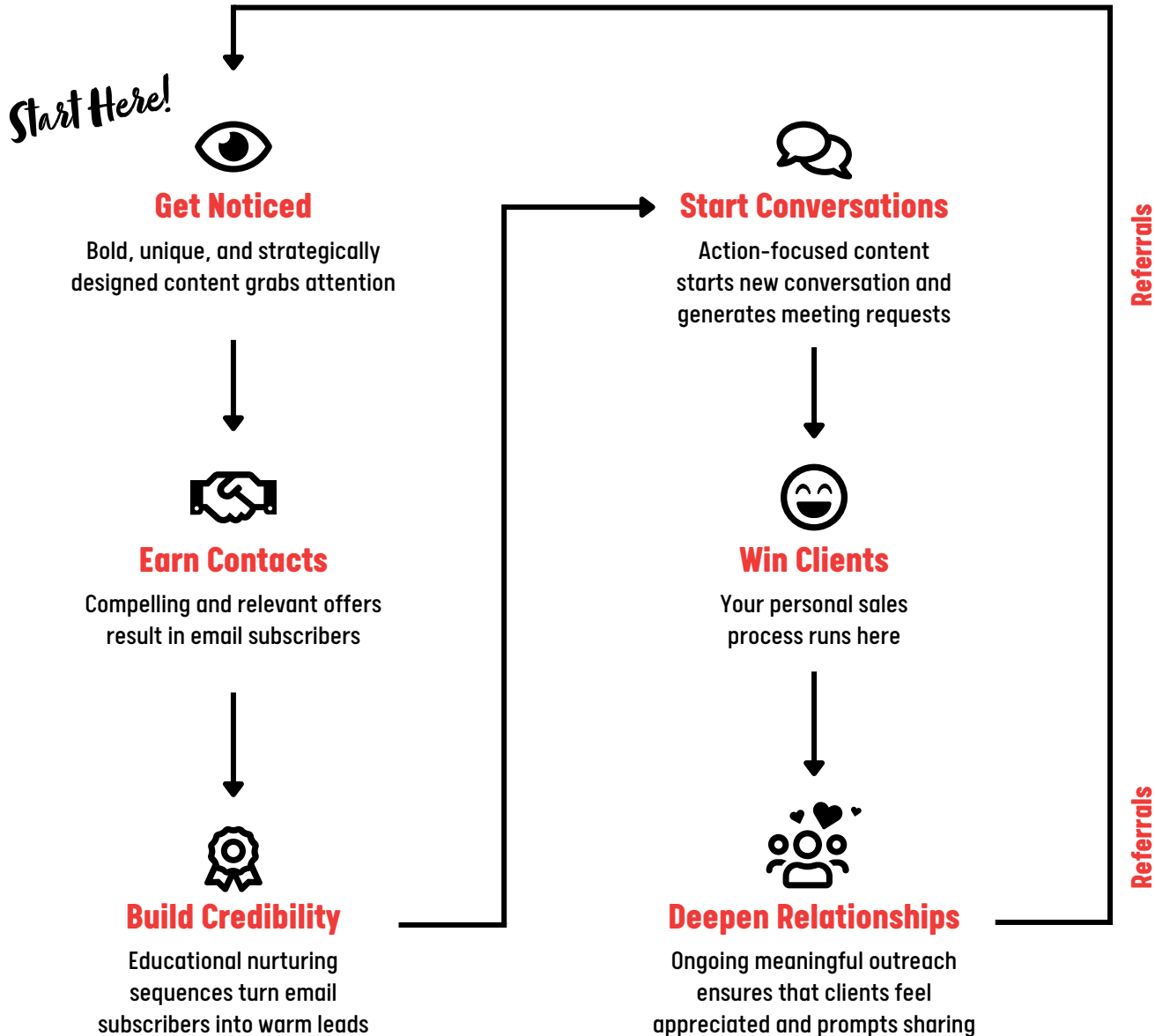
# COMPLETE STRATEGY

*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! Session.

COLD TO GOLD

*Just a little reminder :)*



**Get Noticed**



**Earn Contacts**



**Build Credibility**



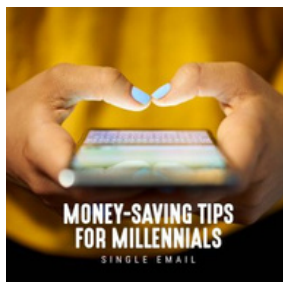
**Start Conversations**



**Win Clients**

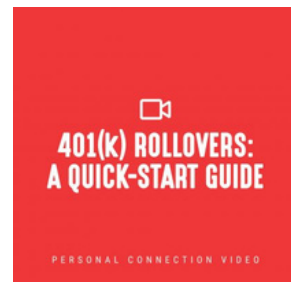


**Deepen Relationships**



**Money-Saving Tips for Millennials Email**

Single Email



**401(k) Rollovers: A Quick-Start Guide**

Personal Connection Video



**Exploring the Shadows of Social Media Finance**

Visual Insights Newsletter



OR



**Retirement in 2050**

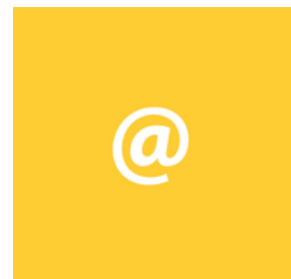
Visual Insights Newsletter



**The Ultimate Checklist for Navigating Retirement**

Lead Generation Campaign

Release Date: 5/10\*



**Timely Emails**

Launch as soon as available



\*Disclaimer: Content availability on enterprise platforms is dependent on enterprise approval.

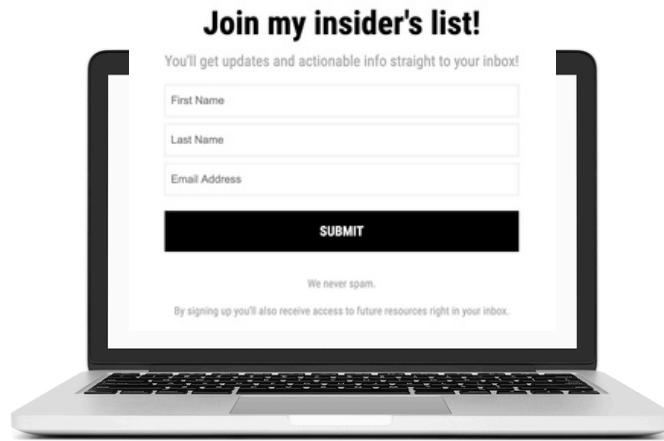
# Let's start with the ESSENTIALS

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.

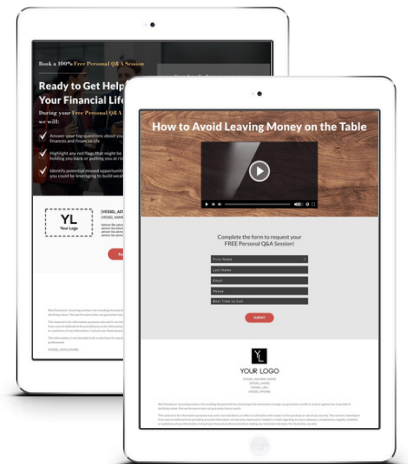
## 90-day New Client Onboarding



## Website Opt-in Form



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



*Coming Soon!*

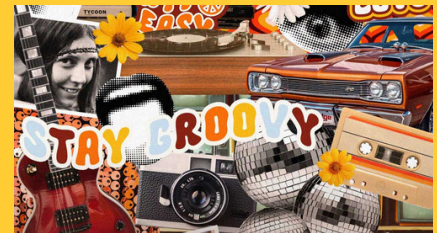
You won't want to miss these dropping soon.



**Maximize Your Retirement Plan**  
Prospect Engagement Campaign



**401(k) Options Overview**  
Single Email



**How Longevity Can Impact Retirement**  
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 Prompts:

.....

### Post this on D-Day - June 6

As we commemorate the anniversary of D-Day, I'm reminded of the sacrifices made by so many to secure a better future for generations to come. Just as they bravely confronted challenges head-on, we should also take proactive steps to ensure financial freedom for our future generations. If you are wondering how to get started with estate or legacy planning, send me a message!

### Post this on Father's Day - June 16

Happy Father's Day to all the incredible dads out there! You guys get it - true wealth isn't just about the money, it's about the love, joy, and security you give your family every single day. Today, we're raising a toast to you and the impact you have on your loved ones' lives. Cheers to you, dads, and the legacy you're creating!

## 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.

- Pride Month
- Caribbean-American Heritage Month
- Native American Day - June 2
- D-Day - June 6
- Belmont Stakes - June 8
- Shavuot - June 12
- Father's Day - June 16
- Juneteenth - June 19
- National Selfie Day - June 21
- Take Your Dog to Work Day - June 22



# JUNE MARKETING CALENDAR

**Monday**

**Tuesday**

**Wednesday**

**Thursday**

**Friday**

**3**

**4**

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**6**

**7**

**10**

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