

# THE **MARKETING MIX**

May 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:



**Mental Health Awareness Month**



**Family Wellness Month**



**Disability Insurance Awareness Month**

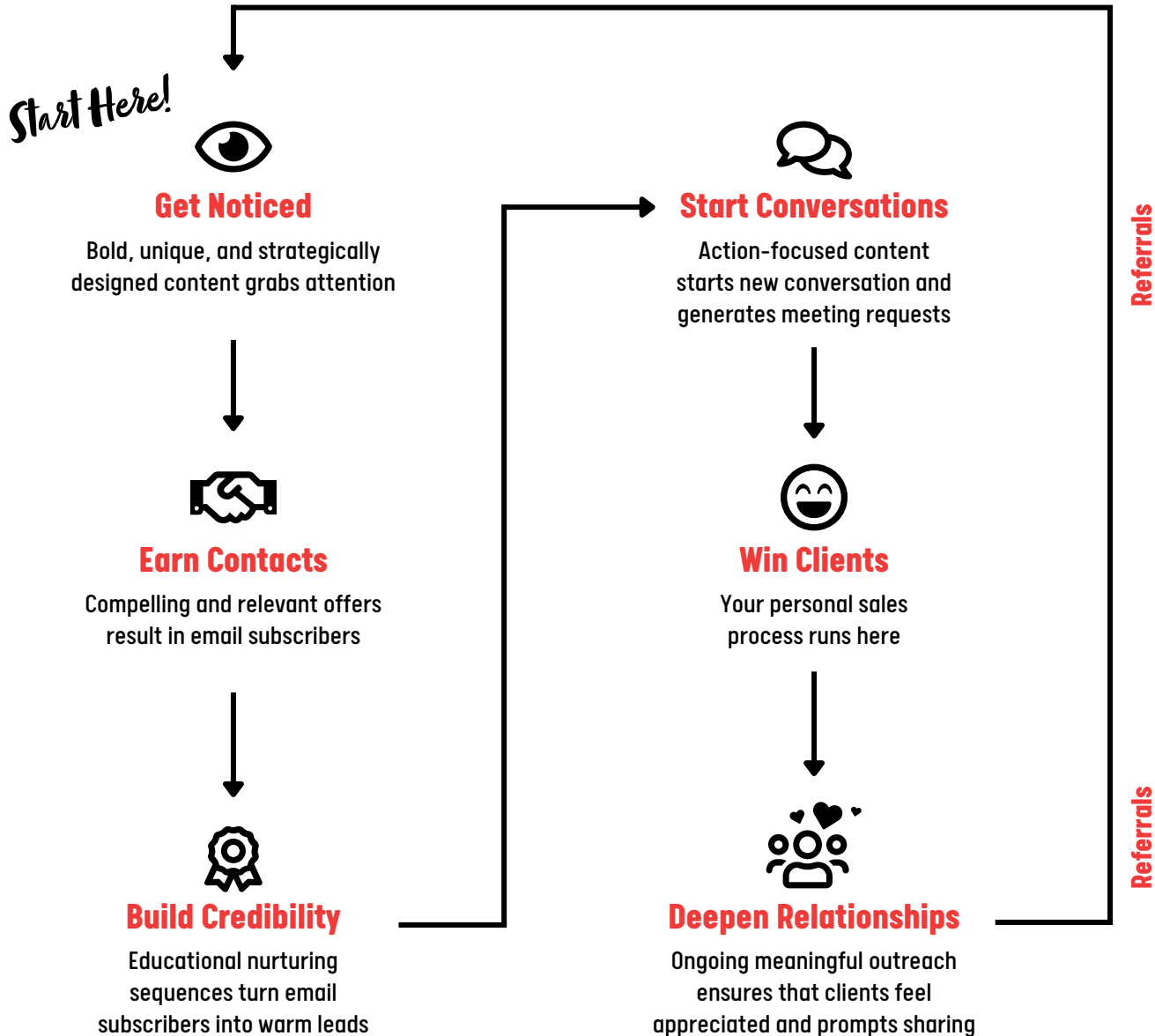
# Achieve better results with a **COMPLETE STRATEGY**

*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!



# 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**

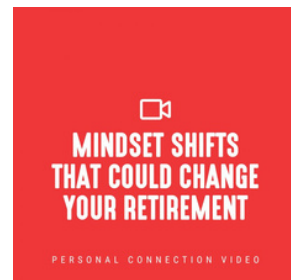


**Deepen Relationships**



**Could A Layoff Spark Our Inner Entrepreneur?**

Single Email



**Mindset Shifts That Could Change Your Retirement**

Personal Connection Video



**Planting Fresh Habits This Spring**

Visual Insights Newsletter

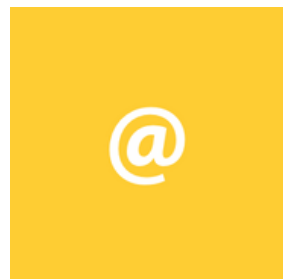


OR



**How Simple Gratitude Practices Can Make Life Better**

Visual Insights Newsletter



**Timely Emails**

Launch as soon as available



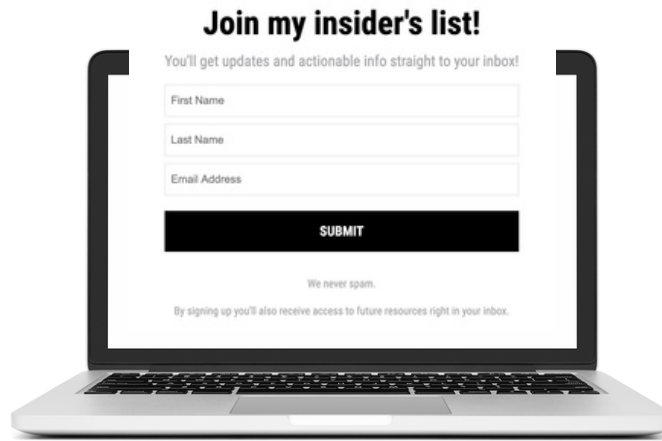
# Let's start with the ESSENTIALS

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.

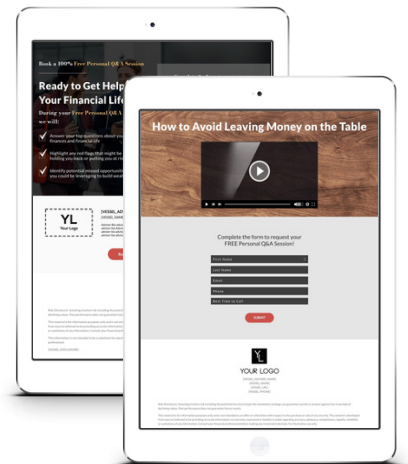
## 90-day New Client Onboarding



## Website Opt-in Form



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



*Coming Soon!*

You won't want to miss these dropping next month.



**Exploring the Shadows of Social Media Finance**  
Lead Generation Campaign



**The Ultimate Checklist for Navigating Retirement**  
Lead Generation Campaign



**Maximize Your Retirement Plan**  
Prospect Engagement Campaign

# 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:

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### Post this on Mother's Day - May 12

Today, we celebrate all the moms out there who work tirelessly behind the scenes to take care of their families. I know mothers often wear multiple hats day in and day out, and it can be overwhelming juggling so many responsibilities. If finance is one of those areas that you'd like more help in, I can help. I work with plenty of families to plan for the future. Comment below or call me at [OFFICE PHONE] to let me know how I can help!

### Post this on Memorial Day - May 27

As we enjoy the freedoms and opportunities afforded to us, let's remember the sacrifices made by our fallen heroes. Their bravery and dedication inspire us to strive for a better tomorrow.



## 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.

- Asian American, Native Hawaiian and Pacific Islander Heritage Month
- National Military Appreciation Month
- Jewish American Heritage Month
- Star Wars Day - May 4
- Cinco de Mayo - May 5
- National Teacher's Day - May 7
- Mother's Day - May 12
- Armed Forces Day - May 18
- Memorial Day - May 27

# MAY MARKETING CALENDAR

**Monday**

**Tuesday**

**Wednesday**

**Thursday**

**Friday**

**1**

**2**

**3**

**6**

**7**

**8**

**9**

**10**

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**31**