

MarketingCentral Automations

Opportunities to Automate Your Communications

All available automations in [MarketingCentral](#) can be found from the left navigation panel—select [Marketing Automations](#), then toggle to **On** to activate as an ongoing campaign. Once you’ve selected to activate an automation, you have the ability to configure the settings and choose your audience. All communications below can also be found in the Content Library for ad-hoc distribution.

Cetera Investment Management Email Automations

Commentary

Title	Description	Frequency
Commentary	Ad-hoc, specialized commentary that provides a timely, comprehensive analysis of economic or investment-related topics in response to unexpected market and world events.	Ad-hoc
Themed Commentary	These lively, short pieces discuss economic trends and market insights related to different world and cultural events.	Will typically send monthly timing varies; if focusing on a holiday, it usually sends a few days before that holiday

Outlooks

Title	Description	Frequency
Annual Market Outlook	The annual market Outlook reviews economic data and financial markets. The publication takes an in-depth look at the trends and market behaviors Cetera Investment Management believes will be important in the coming months and year. <i>Do not send the Annual Market Outlook automation to any contacts receiving the Quarterly Market Outlook automation, since this automation includes the annual Outlook.</i>	December around the 1st week
Quarterly Market Outlook	This Outlook is a quarterly publication that discusses the current economic environment and offers an outlook for the coming business quarter. <i>Do not send the Quarterly Market Outlook automation to any contacts receiving the Annual Market Outlook automation. This automation includes the annual market Outlook, which is delivered each December.</i>	Last week of each quarter in March, June, September, December* <i>*includes Annual Market Outlook</i>

Recap

Title	Description	Frequency
Quarterly Recap	This publication summarizes market performance, major events, and news from the previous quarter. <i>Do not send the Quarterly Recap automation to any contacts receiving the Monthly Recap automation.</i>	Quarterly 1st - 2nd business day of new quarter
Monthly Recap	This email series provides a recap of market performance, major events, and news from the previous month. <i>Do not send the Monthly Recap automation to any contacts receiving the Quarterly Recap automation.</i>	Monthly usually between the 1st and 2nd business day
Weekly Recap	This eNewsletter is an in-depth weekly recap that summarizes market performance, major events, and news from the previous week.	Weekly Monday
Portfolio Advisory Services Client Newsletter <i>(Cetera Financial Specialists only)</i>	Overview of previous quarter within the Portfolio Advisory Services platform.	Quarterly 3rd Friday

For ad-hoc distribution, the emails above can be found in the **Market Updates and Newsletters** collection. Additional market-related automations, such as *FMG Suite's Monthly Market Insights*, are available in upgraded packages.

General Email Automations

Title	Description	Frequency
Retire Wise	Monthly eNewsletter for clients and prospects nearing or new to retirement.	Monthly typically the 2nd Tuesday or soon after
Financial Watch	Monthly email for clients and prospects interested in general financial tips and updates.	Monthly typically the 3rd Thursday or soon after
Cetera Client Referral	Send a friendly request for referrals to your contacts, reminding them that you are available to help friends and family in need of financial guidance.	Quarterly typically the 2nd week of the new quarter

For ad-hoc distribution, the emails above can be found in the **Market Updates and Newsletters** and **Client Prospecting** collections. Additional financial and prospecting automations—such as *FMG Suite's Video of the Month, Referral Sequence, and Pre-Retiree Primer*—are available in upgraded packages.

eCards

Title	Description	Frequency
General Year-End Holidays	Send a holiday eCard for the general year-end holidays. This automation includes a Thanksgiving, Happy Holidays, and Happy New Year eCard.	Annual
Patriotic Holidays	Send an eCard greeting for these patriotic holidays: Memorial Day, Independence Day, and Veterans Day.	Annual

For ad-hoc distribution, additional eCards can be found in the **Everyday Ecards** collection (for greetings addressing special celebrations and sentiments), the **Office Management** collection (for Financial Review eCards) and the **Holidays** collections (for all the main holidays and observances).

Birthday & Holiday Automations: Additional FMG Suite automations are available in upgraded packages.

Social Media

Title	Description	Frequency
Cetera Social	Timely social posts featuring, or authored by, Cetera or the Cetera Investment Management team. Also includes Cetera-curated content: Financial Watch, Retire Wise, Cetera Investment Management Commentaries (ad-hoc and themed), Monthly Recap and Quarterly Market Outlook.	Refer to the frequency noted above under: <ul style="list-style-type: none"> • Cetera Investment Management Email Automations; and • General Financial Email Automations

Additionally, certain FMG Suite packages include the Social Foundation campaign, which automatically posts FMG authored content to your social accounts.

Print

Title	Description	Frequency
Happy Birthday Greeting Card	Send a printed birthday greeting card to your clients each year. Cards are \$2.50/each card, which includes printing and shipping. <i>More design options coming soon!</i>	Annual

To learn more about available upgrades, review the **pricing page** on ceteramarketingcentral.com, and contact FMG Suite with any requests or questions at **858.312.5621**.