

Quarterly Marketing Plan

JULY 2020



INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <p>Starting Out</p> <p>Investing Stage 1 20s to 30s:</p> <p>Simply stated personal finance tips, ideal for connecting with the next generation of clients</p>	<p>WEEK 1 6/28 - 7/4</p> <p>(Carried over from Q2 plan)</p>	<ul style="list-style-type: none"> • Email Sequence (4 of 6): Continue with the Financial Perspectives (under 50) sequence if already started in April 2020* • Independence Day eCard (July 4): This eCard is included in the Patriotic Holidays automation but can also be sent ad hoc 	<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • National Insurance Awareness Day (June 28) • 3 Types of Insurance for Your Child Away at College • Discounts on Auto Insurance • Independence Day (July 4) 	<p>Summer Spritzer</p> <p>Depending on the social regulations in your area, consider hosting a small get-together with clients to enjoy a summer spritzer! You can also host a virtual happy hour if more appropriate.</p> <p>Virtual Events</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available.</p> <p>Hold webinars and conference calls to address market activity and common investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 2 7/5 - 7/11</p>		<ul style="list-style-type: none"> • Time for a Midyear Checkup? • How Are You Spending Your Summer? 	
	<p>WEEK 3 7/12 - 7/18</p>	<ul style="list-style-type: none"> • Automation: Financial Watch July 2020 (typically sends third Thursday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise July 2020 (typically posts the second Tuesday of the month) • Cetera Social Automation: Financial Watch July 2020 (typically posts the third Thursday of the month) 	
	<p>WEEK 4 7/19 - 7/25</p>	<ul style="list-style-type: none"> • Email Sequence (6 of 9): Continue with the Information Security sequence if already started in January 2020* 	<ul style="list-style-type: none"> • National Ice Cream Day (July 19) • Eight Mistakes That Can Upend Your Retirement 	
	<p>WEEK 5 7/26 - 8/1</p>	<ul style="list-style-type: none"> • Email Sequence (5 of 6): Continue with the Financial Perspectives (under 50) sequence if already started in April 2020* 	<ul style="list-style-type: none"> • National Parents' Day (July 26) • The Half Million Dollar Baby 	

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INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <p>Building Wealth</p> <p>Investing Stage 2 40s to early 50s:</p> <p>Communications focused on investors who are accumulating wealth and creating a road map for the future</p>	<p>WEEK 1 6/28 - 7/4</p> <p>(Carried over from Q2 plan)</p>	<ul style="list-style-type: none"> • Email Sequence (4 of 6): Continue with the Financial Perspectives sequence if already started in April 2020 (versions available for under 50 and over 50)* • Automation: Monthly Recap (typically sends on the first or second of the month); send to those contacts with an active interest in market activity • Independence Day eCard (July 4): This eCard is included in the Patriotic Holidays automation but can also be sent ad hoc 	<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • National Insurance Awareness Day (June 28) • 3 Types of Insurance for Your Child Away at College • Discounts on Auto Insurance • Independence Day (July 4) 	<p>Summer Spritzer</p> <p>Depending on the social regulations in your area, consider hosting a small get-together with clients to enjoy a summer spritzer! You can also host a virtual happy hour if more appropriate.</p> <p>Virtual Events</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available.</p> <p>Hold webinars and conference calls to address market activity and common investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 2 7/5 - 7/11</p>		<ul style="list-style-type: none"> • Time for a Midyear Checkup? • How Are You Spending Your Summer? 	
	<p>WEEK 3 7/12 - 7/18</p>	<ul style="list-style-type: none"> • Automation: Financial Watch July 2020 (typically sends third Thursday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise July 2020 (typically posts the second Tuesday of the month) • Cetera Social Automation: Financial Watch July 2020 (typically posts the third Thursday of the month) 	
	<p>WEEK 4 7/19 - 7/25</p>	<ul style="list-style-type: none"> • Email Sequence (6 of 9): Continue with the Information Security sequence if already started in January 2020* 	<ul style="list-style-type: none"> • National Ice Cream Day (July 19) • Eight Mistakes That Can Upend Your Retirement • Soundbyte: Living Longer Is Changing How We Retire 	
	<p>WEEK 5 7/26 - 8/1</p>	<ul style="list-style-type: none"> • Email Sequence (5 of 6): Continue with the Financial Perspectives sequence if already started in April 2020 (versions available for under 50 and over 50)* 	<ul style="list-style-type: none"> • National Parents' Day (July 26) • Estimating the Cost of College • Charitable Giving: Smart from the Heart 	

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INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <p>Nearing Retirement</p> <p>Investing Stage 3 mid 50s to 70s:</p> <p>Communications for pre-retirees including strategy considerations to retire confidently</p>	<p>WEEK 1 6/28 - 7/4</p> <p>(Carried over from Q2 plan)</p>	<ul style="list-style-type: none"> • Email Sequence (4 of 6): Continue with the Financial Perspectives (over 50) sequence if already started in April 2020* • Independence Day eCard (July 4): This eCard is included in the Patriotic Holidays automation but can also be sent ad hoc 	<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • National Insurance Awareness Day (June 28) • Discounts on Auto Insurance • Independence Day (July 4) 	<p>Summer Spritzer</p> <p>Depending on the social regulations in your area, consider hosting a small get-together with clients to enjoy a summer spritzer! You can also host a virtual happy hour if more appropriate.</p> <p>Virtual Events</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available.</p> <p>Hold webinars and conference calls to address market activity and common investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 2 7/5 - 7/11</p>		<ul style="list-style-type: none"> • Time for a Midyear Checkup? • How Are You Spending Your Summer? 	
	<p>WEEK 3 7/12 - 7/18</p>	<ul style="list-style-type: none"> • Automation: Retire Wise July 2020 (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise July 2020 (typically posts the second Tuesday of the month) • Cetera Social Automation: Financial Watch July 2020 (typically posts the third Thursday of the month) 	
	<p>WEEK 4 7/19 - 7/25</p>	<ul style="list-style-type: none"> • Email Sequence (6 of 9): Continue with the Information Security sequence if already started in January 2020* 	<ul style="list-style-type: none"> • National Ice Cream Day (July 19) • Eight Mistakes That Can Upend Your Retirement • Soundbyte: Living Longer Is Changing How We Retire 	
	<p>WEEK 5 7/26 - 8/1</p>	<ul style="list-style-type: none"> • Email Sequence (5 of 6): Continue with the Financial Perspectives (over 50) sequence if already started in April 2020* 	<ul style="list-style-type: none"> • National Parents' Day (July 26) • Charitable Giving: Smart from the Heart 	

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INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <p>Living in Retirement</p> <p>Investing Stage 4 60+:</p> <p>Financial and lifestyle communications targeting retired clients</p>	<p>WEEK 1 6/28 - 7/4</p> <p>(Carried over from Q2 plan)</p>	<ul style="list-style-type: none"> • Email Sequence (4 of 6): Continue with the Financial Perspectives (over 50) sequence if already started in April 2020* • Independence Day eCard (July 4): This eCard is included in the Patriotic Holidays automation but can also be sent ad hoc 	<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • National Insurance Awareness Day (June 28) • Discounts on Auto Insurance • Independence Day (July 4) 	<p>Summer Spritzer</p> <p>Depending on the social regulations in your area, consider hosting a small get-together with clients to enjoy a summer spritzer! You can also host a virtual happy hour if more appropriate.</p>
	<p>WEEK 2 7/5 - 7/11</p>		<ul style="list-style-type: none"> • Time for a Midyear Checkup? • How Are You Spending Your Summer? 	<p>Virtual Events</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available.</p>
	<p>WEEK 3 7/12 - 7/18</p>	<ul style="list-style-type: none"> • Automation: Retire Wise July 2020 (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise July 2020 (typically posts the second Tuesday of the month) • Cetera Social Automation: Financial Watch July 2020 (typically posts the third Thursday of the month) 	<p>Hold webinars and conference calls to address market activity and common investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 4 7/19 - 7/25</p>	<ul style="list-style-type: none"> • Email Sequence (6 of 9): Continue with the Information Security sequence if already started in January 2020* 	<ul style="list-style-type: none"> • National Ice Cream Day (July 19) • The Anatomy of a Supplemental Health Plan • Soundbyte: Living Longer Is Changing How We Retire 	
	<p>WEEK 5 7/26 - 8/1</p>	<ul style="list-style-type: none"> • Email Sequence (5 of 6): Continue with the Financial Perspectives (over 50) sequence if already started in April 2020* 	<ul style="list-style-type: none"> • National Parents' Day (July 26) • Charitable Giving: Smart from the Heart 	

Quarterly Marketing Plan

AUGUST 2020




INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <p>Starting Out</p> <p>Investing Stage 1 20s to 30s:</p> <p>Simply stated personal finance tips, ideal for connecting with the next generation of clients</p>	<p>WEEK 1 8/2 - 8/8</p>		<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • Did You Know? Home Values • National Dollar Day (August 8) 	<p>Back-to-School Donation Drive</p> <p>Host a school supply drop-off to collect items that can be donated to a local school or charity of your choice. Depending on social distancing parameters in your area, you can host a kick-off event with snacks and beverages or simply invite your contacts to drop off donated supplies at their convenience.</p>
	<p>WEEK 2 8/9 - 8/15</p>		<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise August 2020 (typically posts the second Tuesday of the month) • Tip: Share the Knowledge 	<p>Virtual Events</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available.</p>
	<p>WEEK 3 8/16 - 8/22</p>	<ul style="list-style-type: none"> • Email Sequence (7 of 9): Continue with the Information Security sequence if already started in January 2020* • Automation: Financial Watch August 2020 (typically sends the third Thursday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Financial Watch August 2020 (typically posts the third Thursday of the month) • Back to School 	<p>Hold webinars and conference calls to address market activity and common investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 4 8/23 - 8/29</p>	<ul style="list-style-type: none"> • Email Sequence (6 of 6): Continue with the Financial Perspectives (under 50) sequence if already started in April 2020* 	<ul style="list-style-type: none"> • Women on the Rise • National Women's Equality Day (August 26) • Did You Know? Wealth for Women 	

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AUGUST 2020




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 <p>Building Wealth</p> <p>Investing Stage 2 40s to early 50s:</p> <p>Communications focused on investors who are accumulating wealth and creating a road map for the future</p>	<p>WEEK 1 8/2 - 8/8</p>	<ul style="list-style-type: none"> • Automation: Monthly Recap (typically sends on the first or second of the month); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • National Dollar Day (August 8) 	<p>Back-to-School Donation Drive</p> <p>Host a school supply drop-off to collect items that can be donated to a local school or charity of your choice. Depending on social distancing parameters in your area, you can host a kick-off event with snacks and beverages or simply invite your contacts to drop off donated supplies at their convenience.</p> <p>Virtual Events</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available.</p> <p>Hold webinars and conference calls to address market activity and common investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 2 8/9 - 8/15</p>	<ul style="list-style-type: none"> • Automation: Monthly Recap (typically sends on the first or second of the month); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise August 2020 (typically posts the second Tuesday of the month) • Tip: Share the Knowledge 	
	<p>WEEK 3 8/16 - 8/22</p>	<ul style="list-style-type: none"> • Email Sequence (7 of 9): Continue with the Information Security sequence if already started in January 2020* • Automation: Financial Watch August 2020 (typically sends the third Thursday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Financial Watch August 2020 (typically posts the third Thursday of the month) • Back to School • A Cheat Sheet for Sending Your Kid to College 	
	<p>WEEK 4 8/23 - 8/29</p>	<ul style="list-style-type: none"> • Email Sequence (6 of 6): Continue with the Financial Perspectives sequence if already started in April 2020 (versions available for under 50 and over 50)* 	<ul style="list-style-type: none"> • Women on the Rise • National Women's Equality Day (August 26) • Did You Know? Wealth for Women 	

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 <p>Nearing Retirement</p> <p>Investing Stage 3 mid 50s to 70s:</p> <p>Communications for pre-retirees including strategy considerations to retire confidently</p>	<p>WEEK 1 8/2 - 8/8</p>		<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • National Dollar Day (August 8) 	<p>Back-to-School Donation Drive</p> <p>Host a school supply drop-off to collect items that can be donated to a local school or charity of your choice. Depending on social distancing parameters in your area, you can host a kick-off event with snacks and beverages or simply invite your contacts to drop off donated supplies at their convenience.</p>
	<p>WEEK 2 8/9 - 8/15</p>	<ul style="list-style-type: none"> • Automation: Retire Wise August 2020 (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise August 2020 (typically posts the second Tuesday of the month) • Tip: Share the Knowledge • Soundbyte: Get Your Family in the Loop 	<p>Virtual Events</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available.</p>
	<p>WEEK 3 8/16 - 8/22</p>	<ul style="list-style-type: none"> • Email Sequence (7 of 9): Continue with the Information Security sequence if already started in January 2020* 	<ul style="list-style-type: none"> • Cetera Social Automation: Financial Watch August 2020 (typically posts the third Thursday of the month) • National Senior Citizens Day (August 21) 	<p>Hold webinars and conference calls to address market activity and common investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 4 8/23 - 8/29</p>	<ul style="list-style-type: none"> • Email Sequence (6 of 6): Continue with the Financial Perspectives (over 50) sequence if already started in April 2020* 	<ul style="list-style-type: none"> • Women on the Rise • National Women's Equality Day (August 26) • Did You Know? Wealth for Women 	

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AUGUST 2020



INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <p>Living in Retirement</p> <p>Investing Stage 4 60+:</p> <p>Financial and lifestyle communications targeting retired clients</p>	<p>WEEK 1 8/2 - 8/8</p>		<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • National Dollar Day (August 8) 	<p>Back-to-School Donation Drive</p> <p>Host a school supply drop-off to collect items that can be donated to a local school or charity of your choice. Depending on social distancing parameters in your area, you can host a kick-off event with snacks and beverages or simply invite your contacts to drop off donated supplies at their convenience.</p>
	<p>WEEK 2 8/9 - 8/15</p>	<ul style="list-style-type: none"> • Automation: Retire Wise August 2020 (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise August 2020 (typically posts the second Tuesday of the month) • Tip: Share the Knowledge • The Three Keys to a Great Password 	<p>Virtual Events</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available.</p>
	<p>WEEK 3 8/16 - 8/22</p>	<ul style="list-style-type: none"> • Email Sequence (7 of 9): Continue with the Information Security sequence if already started in January 2020* 	<ul style="list-style-type: none"> • Cetera Social Automation: Financial Watch August 2020 (typically posts the third Thursday of the month) • National Senior Citizens Day (August 21) 	<p>Hold webinars and conference calls to address market activity and common investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 4 8/23 - 8/29</p>	<ul style="list-style-type: none"> • Email Sequence (6 of 6): Continue with the Financial Perspectives (over 50) sequence if already started in April 2020* 	<ul style="list-style-type: none"> • Women on the Rise • National Women's Equality Day (August 26) • A New Way to Look at Your Bucket List 	

Quarterly Marketing Plan

SEPTEMBER 2020




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 <p>Starting Out</p> <p>Investing Stage 1 20s to 30s:</p> <p>Simply stated personal finance tips, ideal for connecting with the next generation of clients</p>	<p>WEEK 1 8/30 - 9/5</p> <ul style="list-style-type: none"> • Automation: Monthly Recap (typically sends on the first or second of the month); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • Emergency Preparedness Month • Tip: Are You Building an Emergency Fund? 	<p>Workplace Financial Wellness Workshops: College Savings or Understanding Life Insurance</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available in the Downloadables section of the Content Library. September is College Savings Month and Life Insurance Awareness Month; both topics have event kits available.</p>	
	<p>WEEK 2 9/6 - 9/12</p> <ul style="list-style-type: none"> • September Is Life Insurance Awareness Month 	<ul style="list-style-type: none"> • Labor Day (September 7) • Cetera Social Automation: Retire Wise September 2020 (typically posts the second Tuesday of the month) • Life Insurance Awareness Month 		
	<p>WEEK 3 9/13 - 9/19</p> <ul style="list-style-type: none"> • Automation: Financial Watch September 2020 (typically sends third Thursday of the month) 	<ul style="list-style-type: none"> • National Grandparents Day (September 13) • Cetera Social Automation: Financial Watch September 2020 (typically posts the third Thursday of the month) • Did You Know? Creating an Emergency Fund 		
	<p>WEEK 4 9/20 - 9/26</p> <ul style="list-style-type: none"> • Email Sequence (8 of 9): Continue with the Information Security sequence if already started in January 2020* • Automation: Quarterly Outlook (typically sends by the last week of the quarter); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> • Cetera Social Automation: Quarterly Outlook (typically posts the last week of the quarter) • College Savings Month • Should You Tap Retirement Savings to Fund College? • Term vs. Permanent Life Insurance 		
	<p>WEEK 5 9/27 - 10/3</p>	<ul style="list-style-type: none"> • Your Emergency Fund: How Much Is Enough? • Getting a Head Start on College Savings • The Other Sure Thing 		

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SEPTEMBER 2020



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 <p>Building Wealth</p> <p>Investing Stage 2 40s to early 50s:</p> <p>Communications focused on investors who are accumulating wealth and creating a road map for the future</p>	<p>WEEK 1 8/30 - 9/5</p>	<ul style="list-style-type: none"> • Automation: Monthly or Quarterly Recap (typically sends on the first or second of the month); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • Emergency Preparedness Month • Tip: Are You Building an Emergency Fund? 	<p>Workplace Financial Wellness Workshops: College Savings or Understanding Life Insurance</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available in the Downloadables section of the Content Library. September is College Savings Month and Life Insurance Awareness Month; both topics have event kits available.</p>
	<p>WEEK 2 9/6 - 9/12</p>	<ul style="list-style-type: none"> • September Is Life Insurance Awareness Month 	<ul style="list-style-type: none"> • Labor Day (September 7) • Cetera Social Automation: Retire Wise September 2020 (typically posts the second Tuesday of the month) • Life Insurance Awareness Month 	
	<p>WEEK 3 9/13 - 9/19</p>	<ul style="list-style-type: none"> • Automation: Financial Watch September 2020 (typically sends third Thursday of the month) 	<ul style="list-style-type: none"> • National Grandparents Day (September 13) • Cetera Social Automation: Financial Watch September 2020 (typically posts the third Thursday of the month) • Did You Know? Creating an Emergency Fund 	
	<p>WEEK 4 9/20 - 9/26</p>	<ul style="list-style-type: none"> • Email Sequence (8 of 9): Continue with the Information Security sequence if already started in January 2020* • Automation: Quarterly Outlook (typically sends by the last week of the quarter); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> • Cetera Social Automation: Quarterly Outlook (typically posts the last week of the quarter) • College Savings Month • Should You Tap Retirement Savings to Fund College? • Term vs. Permanent Life Insurance 	
	<p>WEEK 5 9/27 - 10/3</p>		<ul style="list-style-type: none"> • Your Emergency Fund: How Much Is Enough? • Soundbyte: Working Longer May Afford You Larger Benefits • The Other Sure Thing 	

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 <p>Nearing Retirement</p> <p>Investing Stage 3 mid 50s to 70s:</p> <p>Communications for pre-retirees including strategy considerations to retire confidently</p>	<p>WEEK 1 8/30 - 9/5</p>	<ul style="list-style-type: none"> September Is Life Insurance Awareness Month 	<ul style="list-style-type: none"> Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) Emergency Preparedness Month Tip: Are You Building an Emergency Fund? 	<p>Workplace Financial Wellness Workshops: College Savings or Understanding Life Insurance</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available in the Downloadables section of the Content Library. September is College Savings Month and Life Insurance Awareness Month; both topics have event kits available.</p>
	<p>WEEK 2 9/6 - 9/12</p>	<ul style="list-style-type: none"> Automation: Retire Wise September 2020 (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> Labor Day (September 7) Cetera Social Automation: Retire Wise September 2020 (typically posts the second Tuesday of the month) Life Insurance Awareness Month 	
	<p>WEEK 3 9/13 - 9/19</p>		<ul style="list-style-type: none"> National Grandparents Day (September 13) Cetera Social Automation: Financial Watch September 2020 (typically posts the third Thursday of the month) 	
	<p>WEEK 4 9/20 - 9/26</p>	<ul style="list-style-type: none"> Email Sequence (8 of 9): Continue with the Information Security sequence if already started in January 2020* Automation: Quarterly Outlook (typically sends by the last week of the quarter); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> Cetera Social Automation: Quarterly Outlook (typically posts the last week of the quarter) First Day of Fall (September 22) Term vs. Permanent Life Insurance 	
	<p>WEEK 5 9/27 - 10/3</p>		<ul style="list-style-type: none"> Your Emergency Fund: How Much Is Enough? The Other Sure Thing Test Your Life Insurance Knowledge 	

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INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <p>Living in Retirement</p> <p>Investing Stage 4 60+: Financial and lifestyle communications targeting retired clients</p>	<p>WEEK 1 8/30 - 9/5</p>	<ul style="list-style-type: none"> September Is Life Insurance Awareness Month 	<ul style="list-style-type: none"> Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) Emergency Preparedness Month 	<p>Workplace Financial Wellness Workshops: College Savings or Understanding Life Insurance</p> <p>NEW—Workplace Financial Wellness Workshop Event Kits are now available in the Downloadables section of the Content Library. September is College Savings Month and Life Insurance Awareness Month; both topics have event kits available.</p>
	<p>WEEK 2 9/6 - 9/12</p>	<ul style="list-style-type: none"> Automation: Retire Wise September 2020 (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> Labor Day (September 7) Cetera Social Automation: Retire Wise September 2020 (typically posts the second Tuesday of the month) Life Insurance Awareness Month 	
	<p>WEEK 3 9/13 - 9/19</p>		<ul style="list-style-type: none"> National Grandparents Day (September 13) Cetera Social Automation: Financial Watch September 2020 (typically posts the third Thursday of the month) 	
	<p>WEEK 4 9/20 - 9/26</p>	<ul style="list-style-type: none"> Email Sequence (8 of 9): Continue with the Information Security sequence if already started in January 2020* Automation: Quarterly Outlook (typically sends by the last week of the quarter); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> Cetera Social Automation: Quarterly Outlook (typically posts the last week of the quarter) First Day of Fall (September 22) Term vs. Permanent Life Insurance 	
	<p>WEEK 5 9/27 - 10/3</p>		<ul style="list-style-type: none"> Your Emergency Fund: How Much Is Enough? Test Your Life Insurance Knowledge 	

Unless otherwise indicated, most of the MarketingCentral content recommendations can be found in the collections area in the Content Library. Find the collection for the current month. Also, check the monthly collections regularly as timely content not featured in this plan may be added.



Helpful Resources

Go to the Cetera Resources Page (<https://cetera.fmgsuite.com/experience/cetera-resources/>) to access the **Marketing Strategy & Best Practices** guide for marketing guidance and assistance planning your baseline strategy. This is also where you can also find the **2020 Marketing Calendar Template** to build your marketing calendar using the recommendations in this plan.



Emails

Segmenting your audiences will help you send more meaningful communications. Aim to send two to three marketing emails to your segmented groups each month. For market-related pieces, be sure to consider your audience and interest in receiving ongoing updates. While some may have a high interest in market activity, others may be more suited for a quarterly or annual market publication. Also, please check the **Market Updates and Newsletters collection** within the MarketingCentral Content Library for the latest Commentary pieces. These are published as market or cultural events dictate.

*Emails that are part of Email Sequences noted in the Quarterly Marketing Plan may not actually deliver on the week indicated in the plan. If you'd rather see a true snapshot of your communications, we recommend using the Marketing Calendar tool (in the Helpful Resources area noted above) to schedule your communications.



Social Media Posts

Post to your social sites at least three times per week. A more consistent presence will ensure you are seen. Keep LinkedIn posts focused on business and consider sharing a monthly or quarterly blog, in addition to using the pre-approved content in MarketingCentral. Consider posting 80% business content and 20% personal/non-financial content to highlight you, your staff, and your community efforts, along with holidays and other relatable topics. Personal content is best suited for Facebook.

For more social post options, check the **Social Posts and Web Content sections** within the MarketingCentral Content Library.

Create your own social posts by clicking Social in the left navigation of MarketingCentral, and then select Post on Social Media. (Note: Your social sites must be monitored by your broker-dealer's required social media supervision tool. Contact socialmedia@cetera.com to learn more.)

Please note that social media posts cannot be targeted to a specific segment. Recommendations above can often apply to more than one segment. Consider prioritizing posts that engage your larger audience.



Events

Workplace Financial Wellness Workshop Event Kits are now available in the **Downloadables section** of the Content Library. You'll find brand new PowerPoint presentations along with promotional items such as event brochures, handouts, and more. These materials are available for download and can be customized outside of MarketingCentral. Therefore, approvals of all event presentations and related marketing collateral should be manually submitted to Advertising Review. Once you are ready to promote your event, consider using MarketingCentral's Event Builder.