

# Quarterly Marketing Plan

JANUARY 2021




INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <p><b>Starting Out</b></p> <p>Investing Stage 1 <b>20s to 30s:</b></p> <p>Simply stated personal finance tips, ideal for connecting with the next generation of clients</p>	<p><b>WEEK 1</b> 12/27 - 1/2</p> <p>(Carried over from Q4 plan)</p>	<ul style="list-style-type: none"> <li>• <b>New Year eCard   Sparkle (December 31):</b> This eCard is included in the General Year-End Holidays automation but can also be sent ad hoc</li> </ul>	<ul style="list-style-type: none"> <li>• Happy New Year (January 1)</li> <li>• The Average American Budget</li> </ul>
	<p><b>WEEK 2</b> 1/3 - 1/9</p>	<ul style="list-style-type: none"> <li>• 8 Financial Terms You Need to Know</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li>• Terms to Know: Tax Deductions</li> </ul>
	<p><b>WEEK 3</b> 1/10 - 1/16</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Cetera Client Referral (typically sends the second week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• Terms to Know: Compound Interest</li> </ul>
	<p><b>WEEK 4</b> 1/17 - 1/23</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Financial Watch (typically sends third Thursday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>• Happy Martin Luther King, Jr. Day (January 18)</li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> <li>• Terms to Know: Fixed-Rate Mortgage</li> </ul>
	<p><b>WEEK 5</b> 1/24 - 1/30</p>		<ul style="list-style-type: none"> <li>• Terms to Know: Refinancing</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li>• <b>2021 Outlook Webinar</b>—host a webinar (or in-person event if social distancing allows) to share your outlook for the new year. The Annual Market Outlook from the Cetera Investment Management team can be found in the Market Updates &amp; Newsletters collection and the corresponding presentation within the Downloadables section of the Content Library.</li> </ul>	

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 <p><b>Building Wealth</b></p> <p>Investing Stage 2 <b>40s to early 50s:</b></p> <p>Communications focused on investors who are accumulating wealth and creating a road map for the future</p>	<p><b>WEEK 1</b> 12/27 - 1/2</p> <p>(Carried over from Q4 plan)</p>	<ul style="list-style-type: none"> <li>• <b>New Year eCard   Sparkle (December 31):</b> This eCard is included in the General Year-End Holidays automation but can also be sent ad hoc</li> </ul>	<ul style="list-style-type: none"> <li>• Happy New Year (January 1)</li> <li>• The Average American Budget</li> </ul>
	<p><b>WEEK 2</b> 1/3 - 1/9</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Monthly Recap (typically sends around the first or second of the month)</li> <li>• Improve Your Financial Health in 2021</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li>• Financial Health: Have You Started Saving?</li> </ul>
	<p><b>WEEK 3</b> 1/10 - 1/16</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Cetera Client Referral (typically sends the second week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• Financial Health: Emergency Fund</li> </ul>
	<p><b>WEEK 4</b> 1/17 - 1/23</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Financial Watch (typically sends third Thursday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>• Happy Martin Luther King, Jr. Day (January 18)</li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<p><b>WEEK 5</b> 1/24 - 1/30</p>		<ul style="list-style-type: none"> <li>• Your Emergency Fund: How Much Is Enough?</li> <li>• Rebalancing Your Portfolio</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li>• <b>2021 Outlook Webinar</b>—host a webinar (or in person event if social distancing allows) to share your outlook for the new year. The Annual Market Outlook from the Cetera Investment Management team can be found in the Market Updates &amp; Newsletters collection and corresponding presentation within the Downloadables section of the Content Library.</li> </ul>	

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 <p><b>Nearing Retirement</b></p> <p>Investing Stage 3 <b>mid 50s to 70s:</b></p> <p>Communications for pre-retirees including strategy considerations to retire confidently</p>	<p><b>WEEK 1</b> 12/27 - 1/2</p> <p>(Carried over from Q4 plan)</p>	<ul style="list-style-type: none"> <li>• <b>New Year eCard   Sparkle (December 31):</b> This eCard is included in the General Year-End Holidays automation but can also be sent ad hoc</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Happy New Year (January 1)</b></li> </ul>
	<p><b>WEEK 2</b> 1/3 - 1/9</p>	<ul style="list-style-type: none"> <li>• 6 Questions to Ask When Planning for Retirement</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li>• Questions Before Retirement: Age</li> </ul>
	<p><b>WEEK 3</b> 1/10 - 1/16</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Retire Wise (typically sends the second Tuesday of the month)</li> <li>• <b>Automation:</b> Cetera Client Referral (typically sends the second week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• Important Birthdays Over 50</li> </ul>
	<p><b>WEEK 4</b> 1/17 - 1/23</p>		<ul style="list-style-type: none"> <li>• <b>Happy Martin Luther King, Jr. Day (January 18)</b></li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<p><b>WEEK 5</b> 1/24 - 1/30</p>		<ul style="list-style-type: none"> <li>• Questions Before Retirement: Residence</li> <li>• Rebalancing Your Portfolio</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li>• <b>2021 Outlook Webinar</b>—host a webinar (or in person event if social distancing allows) to share your outlook for the new year. The Annual Market Outlook from the Cetera Investment Management team can be found in the Market Updates &amp; Newsletters collection and corresponding presentation within the Downloadables section of the Content Library.</li> </ul>	

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 <p><b>Living in Retirement</b></p> <p>Investing Stage 4 <b>60+:</b></p> <p>Financial and lifestyle communications targeting retired clients</p>	<p><b>WEEK 1</b> 12/27 - 1/2</p> <p>(Carried over from Q4 plan)</p>	<ul style="list-style-type: none"> <li>• <b>New Year eCard   Sparkle (December 31):</b> This eCard is included in the General Year-End Holidays automation but can also be sent ad hoc</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Happy New Year (January 1)</b></li> </ul>
	<p><b>WEEK 2</b> 1/3 - 1/9</p>	<ul style="list-style-type: none"> <li>• 7 Retirement Mistakes to Avoid in 2021</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li>• Retirement Mistakes: Not Accounting for Taxes</li> </ul>
	<p><b>WEEK 3</b> 1/10 - 1/16</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Retire Wise (typically sends the second Tuesday of the month)</li> <li>• <b>Automation:</b> Cetera Client Referral (typically sends the second week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• Important Birthdays Over 50</li> </ul>
	<p><b>WEEK 4</b> 1/17 - 1/23</p>		<ul style="list-style-type: none"> <li>• <b>Happy Martin Luther King, Jr. Day (January 18)</b></li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<p><b>WEEK 5</b> 1/24 - 1/30</p>		<ul style="list-style-type: none"> <li>• Retirement Mistakes: Medical Expenses</li> <li>• How Retirement Spending Changes with Time</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li>• <b>2021 Outlook Webinar</b>—host a webinar (or in person event if social distancing allows) to share your outlook for the new year. The Annual Market Outlook from the Cetera Investment Management team can be found in the Market Updates &amp; Newsletters collection and corresponding presentation within the Downloadables section of the Content Library.</li> </ul>	

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	<p><b>WEEK 2</b> 2/7 - 2/13</p>		<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>Married: File Jointly</li> </ul>
	<p><b>WEEK 3</b> 2/14 - 2/20</p>	<ul style="list-style-type: none"> <li><b>Automation:</b> Financial Watch (typically sends third Thursday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>Valentine's Day (February 14)</li> <li>Presidents' Day (February 15)</li> <li><b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<p><b>WEEK 4</b> 2/21 - 2/27</p>		<ul style="list-style-type: none"> <li>Married: File Separately</li> <li>Budget Check Up: Tax Time Is the Right Time</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li><b>Client Appreciation: Virtual Wine Tasting</b>—many wineries and third-party companies have adapted to COVID-19 by offering virtual wine tastings that you can host for your clients. A quick internet search will yield results for options in your area, or check out <a href="#">these recommendations</a> from Business Insider.</li> </ul>	

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 <p><b>Building Wealth</b></p> <p>Investing Stage 2 <b>40s to early 50s:</b></p> <p>Communications focused on investors who are accumulating wealth and creating a road map for the future</p>	<p><b>WEEK 1</b> 1/31 - 2/6</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Monthly Recap (typically sends around the first or second of the month)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li>• <b>Groundhog Day (February 2)</b></li> <li>• Super Bowl: Create your own post, or use the pre-approved Super Bowl post</li> </ul>
	<p><b>WEEK 2</b> 2/7 - 2/13</p>	<ul style="list-style-type: none"> <li>• Explore Tax-Loss Harvesting</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• Tax-Loss Harvesting</li> </ul>
	<p><b>WEEK 3</b> 2/14 - 2/20</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Financial Watch (typically sends the third Thursday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Valentine's Day (February 14)</b></li> <li>• <b>Presidents' Day (February 15)</b></li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<p><b>WEEK 4</b> 2/21 - 2/27</p>		<ul style="list-style-type: none"> <li>• Budget Check Up: Tax Time Is the Right Time</li> <li>• A Taxing Story: Capital Gain and Losses</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li>• <b>Client Appreciation: Virtual Wine Tasting</b>—many wineries and third-party companies have adapted to COVID-19 by offering virtual wine tastings that you can host for your clients. A quick internet search will yield results for options in your area, or check out <a href="#">these recommendations</a> from Business Insider.</li> </ul>	

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	<p><b>WEEK 2</b> 2/7 - 2/13</p>	<ul style="list-style-type: none"> <li><b>Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> </ul>	<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>Retirement Tax Strategy: Know Your Options</li> <li>A Look at Systematic Withdrawals</li> </ul>
	<p><b>WEEK 3</b> 2/14 - 2/20</p>		<ul style="list-style-type: none"> <li>Valentine's Day (February 14)</li> <li>Presidents' Day (February 15)</li> <li><b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> <li>Retirement Tax Strategy: Delay Your Benefits</li> </ul>
	<p><b>WEEK 4</b> 2/21 - 2/27</p>		<ul style="list-style-type: none"> <li>Tax Deductions You Won't Believe</li> <li>Social Security: Maximizing Benefits</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li><b>Client Appreciation: Virtual Wine Tasting</b>—many wineries and third-party companies have adapted to COVID-19 by offering virtual wine tastings that you can host for your clients. A quick internet search will yield results for options in your area, or check out <a href="#">these recommendations</a> from Business Insider.</li> </ul>	

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	<p><b>WEEK 2</b> 2/7 - 2/13</p>	<ul style="list-style-type: none"> <li><b>Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> </ul>	<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>What Is Portfolio Rebalancing?</li> </ul>
	<p><b>WEEK 3</b> 2/14 - 2/20</p>		<ul style="list-style-type: none"> <li>Valentine's Day (February 14)</li> <li>Presidents' Day (February 15)</li> <li><b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<p><b>WEEK 4</b> 2/21 - 2/27</p>		<ul style="list-style-type: none"> <li>Does Your Portfolio Fit Your Retirement Lifestyle?</li> <li>Rebalancing Your Portfolio</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li><b>Client Appreciation: Virtual Wine Tasting</b>—many wineries and third-party companies have adapted to COVID-19 by offering virtual wine tastings that you can host for your clients. A quick internet search will yield results for options in your area, or check out <a href="#">these recommendations</a> from Business Insider.</li> </ul>	



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	<p><b>WEEK 2</b> 3/7 - 3/13</p>		<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>Daylight Savings Reminder</li> <li>Pay Yourself First</li> </ul>
	<p><b>WEEK 3</b> 3/14 - 3/20</p>	<ul style="list-style-type: none"> <li><b>Automation:</b> Financial Watch (typically sends third Thursday of the month)</li> </ul>	<ul style="list-style-type: none"> <li><b>St. Patrick's Day (March 17)</b></li> <li><b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<p><b>WEEK 4</b> 3/21 - 3/27</p>	<ul style="list-style-type: none"> <li><b>Automation:</b> Quarterly Market Outlook (typically posts the last week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Quarterly Market Outlook (typically posts the last week of the quarter)</li> <li>What is Roth 401(k)?</li> </ul>
	<p><b>WEEK 5</b> 3/28 - 4/3</p>		<ul style="list-style-type: none"> <li>Where Will Your Retirement Money Come From?</li> <li>Roth 401(k) vs. Traditional 401(k)</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li>It's time for some spring cleaning. Host a <b>Paper Shredding Event</b> to allow clients and prospects to drop off secure personal documents for safe disposal. Extend the invitation to friends and family. Be sure to put safe social distancing parameters in place to create a comfortable environment for document drop-off.</li> </ul>	

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	<p><b>WEEK 2</b> 3/7 - 3/13</p>	<ul style="list-style-type: none"> <li>• Are Streaming Services Keeping You from Retiring?</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• Daylight Savings Reminder</li> <li>• Streaming Services</li> </ul>
	<p><b>WEEK 3</b> 3/14 - 3/20</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Financial Watch (typically sends third Thursday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>St. Patrick's Day (March 17)</b></li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
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	<p><b>WEEK 5</b> 3/28 - 4/3</p>		<ul style="list-style-type: none"> <li>• The Richest Man in Babylon</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li>• It's time for some spring cleaning. Host a <b>Paper Shredding Event</b> to allow clients and prospects to drop off secure personal documents for safe disposal. Extend the invitation to friends and family. Be sure to put safe social distancing parameters in place to create a comfortable environment for document drop-off.</li> </ul>	

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	<p><b>WEEK 2</b> 3/7 - 3/13</p>	<ul style="list-style-type: none"> <li><b>Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> </ul>	<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>Daylight Savings Reminder</li> <li>Budget Myth: Time</li> </ul>
	<p><b>WEEK 3</b> 3/14 - 3/20</p>		<ul style="list-style-type: none"> <li><b>St. Patrick's Day (March 17)</b></li> <li><b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<p><b>WEEK 4</b> 3/21 - 3/27</p>	<ul style="list-style-type: none"> <li><b>Automation:</b> Quarterly Market Outlook (typically posts the last week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Quarterly Market Outlook (typically posts the last week of the quarter)</li> <li>Budget Myth: Wants</li> </ul>
	<p><b>WEEK 5</b> 3/28 - 4/3</p>		<ul style="list-style-type: none"> <li>Budget Myth: Tracking</li> <li>A Penny Saved is Two Pennies Earned</li> <li>Affordable Locations for Destination Retirement</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li>It's time for some spring cleaning. Host a <b>Paper Shredding Event</b> to allow clients and prospects to drop off secure personal documents for safe disposal. Extend the invitation to friends and family. Be sure to put safe social distancing parameters in place to create a comfortable environment for document drop-off.</li> </ul>	

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MARCH 2021



INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <p><b>Living in Retirement</b></p> <p>Investing Stage 4 <b>60+:</b></p> <p>Financial and lifestyle communications targeting retired clients</p>	<p><b>WEEK 1</b> 2/28 - 3/6</p>	<ul style="list-style-type: none"> <li>Smart Saving Tips During Retirement</li> </ul>	<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li><b>Employee Appreciation Day (March 5):</b> Create your own post highlighting your staff, or use the pre-approved Employee Appreciation post</li> </ul>
	<p><b>WEEK 2</b> 3/7 - 3/13</p>	<ul style="list-style-type: none"> <li><b>Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> </ul>	<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>Daylight Savings Reminder</li> </ul>
	<p><b>WEEK 3</b> 3/14 - 3/20</p>		<ul style="list-style-type: none"> <li><b>St. Patrick's Day (March 17)</b></li> <li><b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<p><b>WEEK 4</b> 3/21 - 3/27</p>	<ul style="list-style-type: none"> <li><b>Automation:</b> Quarterly Market Outlook (typically posts the last week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Quarterly Market Outlook (typically posts the last week of the quarter)</li> <li>Saving Tips During Retirement</li> </ul>
	<p><b>WEEK 5</b> 3/28 - 4/3</p>		<ul style="list-style-type: none"> <li>Rightsizing for Retirement</li> <li>Avoiding Cognitive Decline</li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li>It's time for some spring cleaning. Host a <b>Paper Shredding Event</b> to allow clients and prospects to drop off secure personal documents for safe disposal. Extend the invitation to friends and family. Be sure to put safe social distancing parameters in place to create a comfortable environment for document drop-off.</li> </ul>	

**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 and timely collections regularly as content not featured in this plan may be added.**



## Helpful Resources

Go to the Cetera Resources Page (<https://fmgsuite.com/marketingcentral/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 **2021 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 both business/educational and 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, Web Content, and Curator 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](mailto: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** and other presentations are available in the **Downloadables section** of the Content Library. You'll find 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.