

Quarterly Marketing Plan

APRIL 2021




INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <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 3/28 - 4/3</p> <p>(Carried over from Q1 plan)</p>	<ul style="list-style-type: none"> • Passover eCard (begins March 27): Send to clients who you know celebrate this holiday 	<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • Passover (March 27 - April 4) • Why Is Form 5498 Important?
	<p>WEEK 2 4/4 - 4/10</p>	<ul style="list-style-type: none"> • Easter eCard (April 4): Send to clients who you know celebrate this holiday • Automation: Cetera Client Referral (typically sends the second week of the quarter) 	<ul style="list-style-type: none"> • Easter (April 4) • Have You Received Your 5498 Form? • Tax Day Reminder
	<p>WEEK 3 4/11 - 4/17</p>	<ul style="list-style-type: none"> • Automation: Financial Watch (typically sends third Thursday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month) • Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month) • Financial Literacy Awareness Month: Share a photo and explain how you're helping to spread financial literacy or use the pre-approved Financial Literacy Month post.
	<p>WEEK 4 4/18 - 4/24</p>	<ul style="list-style-type: none"> • Credit Card Debt: How to Get Rid of It 	<ul style="list-style-type: none"> • Volunteer Week (April 18-24) • Earth Day (April 22) • Minimize Your Credit Card Debt
	<p>WEEK 5 4/25 - 5/1</p>		<ul style="list-style-type: none"> • Paying Off Your Debt • Paying Off a Credit Card (calculator)
	<p>EVENTS</p>	<ul style="list-style-type: none"> • National Volunteer Week - National Volunteer Week falls on April 18 - 24, 2021. Find a volunteer opportunity in your area (either in-person or virtual) and invite your clients and prospects to join. • Financial Literacy Webinar - Hold a webinar addressing the basics of financial literacy and invite your clients and prospects to attend with their younger children. Visit the Downloadables section of the Content Library for resources and presentations. 	

Quarterly Marketing Plan

APRIL 2021



INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <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 3/28 - 4/3</p> <p>(Carried over from Q1 plan)</p>	<ul style="list-style-type: none"> • Passover eCard (begins March 27): Send to clients who you know celebrate this holiday • What Is Form 5498? 	<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • Passover (March 27 - April 4) • Why Is Form 5498 Important?
	<p>WEEK 2 4/4 - 4/10</p>	<ul style="list-style-type: none"> • Easter eCard (April 4): Send to clients who you know celebrate this holiday • Automation: Cetera Client Referral (typically sends the second week of the quarter) 	<ul style="list-style-type: none"> • Easter (April 4) • Have You Received Your 5498 Form? • Tax Day Reminder
	<p>WEEK 3 4/11 - 4/17</p>	<ul style="list-style-type: none"> • Automation: Financial Watch (typically sends third Thursday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month) • Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month) • Financial Literacy Awareness Month: Share a photo and explain how you're helping to spread financial literacy or use the pre-approved Financial Literacy Month post.
	<p>WEEK 4 4/18 - 4/24</p>		<ul style="list-style-type: none"> • Volunteer Week (April 18-24) • Earth Day (April 22) • Minimize Your Credit Card Debt
	<p>WEEK 5 4/25 - 5/1</p>		<ul style="list-style-type: none"> • Paying Off Your Debt • Paying Off a Credit Card (calculator)
	<p>EVENTS</p>	<ul style="list-style-type: none"> • National Volunteer Week - National Volunteer Week falls on April 18 - 24, 2021. Find a volunteer opportunity in your area (either in-person or virtual) and invite your clients and prospects to join. • Financial Literacy Webinar - Hold a webinar addressing the basics of financial literacy and invite your clients and prospects to attend with their younger children. Visit the Downloadables section of the Content Library for resources and presentations. 	

Quarterly Marketing Plan

APRIL 2021



INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <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 3/28 - 4/3</p> <p>(Carried over from Q1 plan)</p>	<ul style="list-style-type: none"> • Passover eCard (begins March 27): Send to clients who you know celebrate this holiday 	<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • Passover (March 27 - April 4)
	<p>WEEK 2 4/4 - 4/10</p>	<ul style="list-style-type: none"> • Easter eCard (April 4): Send to clients who you know celebrate this holiday • Automation: Cetera Client Referral (typically sends the second week of the quarter) 	<ul style="list-style-type: none"> • Easter (April 4) • Tax Day Reminder
	<p>WEEK 3 4/11 - 4/17</p>	<ul style="list-style-type: none"> • Automation: Retire Wise (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month) • Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month) • Financial Literacy Awareness Month: Share a photo and explain how you're helping to spread financial literacy or use the pre-approved Financial Literacy Month post.
	<p>WEEK 4 4/18 - 4/24</p>	<ul style="list-style-type: none"> • Using Trusts in Your Estate Plan 	<ul style="list-style-type: none"> • Volunteer Week (April 18-24) • Earth Day (April 22) • Are Trusts and Wills the Same Thing? • What Should Be in Your Estate Plan?
	<p>WEEK 5 4/25 - 5/1</p>		<ul style="list-style-type: none"> • Trusts Give You More Control • Why Are Beneficiaries Important?
	<p>EVENTS</p>	<ul style="list-style-type: none"> • National Volunteer Week - National Volunteer Week falls on April 18 - 24, 2021. Find a volunteer opportunity in your area (either in-person or virtual) and invite your clients and prospects to join. • Financial Literacy Webinar - Hold a webinar addressing the basics of financial literacy and invite your clients and prospects to attend with their younger children or grandchildren. Visit the Downloadables section of the Content Library for resources and presentations. 	

Quarterly Marketing Plan

APRIL 2021




INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <p>Living in Retirement</p> <p>Investing Stage 4 60+:</p> <p>Financial and lifestyle communications targeting retired clients</p>	<p>WEEK 1 3/28 - 4/3</p> <p>(Carried over from Q1 plan)</p>	<ul style="list-style-type: none"> • Passover eCard (begins March 27): Send to clients who you know celebrate this holiday 	<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • Passover (March 27 - April 4)
	<p>WEEK 2 4/4 - 4/10</p>	<ul style="list-style-type: none"> • Easter eCard (April 4): Send to clients who you know celebrate this holiday • Automation: Cetera Client Referral (typically sends the second week of the quarter) 	<ul style="list-style-type: none"> • Easter (April 4) • Tax Day Reminder
	<p>WEEK 3 4/11 - 4/17</p>	<ul style="list-style-type: none"> • Automation: Retire Wise (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month) • Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month) • Financial Literacy Awareness Month: Share a photo and explain how you're helping to spread financial literacy or use the pre-approved Financial Literacy Month post.
	<p>WEEK 4 4/18 - 4/24</p>	<ul style="list-style-type: none"> • Estate Planning Reminders 	<ul style="list-style-type: none"> • Volunteer Week (April 18-24) • Earth Day (April 22) • Are Trusts and Wills the Same Thing? • What Should Be in Your Estate Plan?
	<p>WEEK 5 4/25 - 5/1</p>		<ul style="list-style-type: none"> • Trusts Give You More Control • Why Are Beneficiaries Important?
	<p>EVENTS</p>	<ul style="list-style-type: none"> • National Volunteer Week - National Volunteer Week falls on April 18 - 24, 2021. Find a volunteer opportunity in your area (either in-person or virtual) and invite your clients and prospects to join. • Financial Literacy Webinar - Hold a webinar addressing the basics of financial literacy and invite your clients and prospects to attend with their younger children or grandchildren. Visit the Downloadables section of the Content Library for resources and presentations. 	

Quarterly Marketing Plan

MAY 2021



INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <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 5/2 - 5/8</p>	<ul style="list-style-type: none"> Tips for Paying Off College Debt 	<ul style="list-style-type: none"> Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) College Loans: Refinance
	<p>WEEK 2 5/9 - 5/15</p>	<ul style="list-style-type: none"> Mother's Day eCard (May 9): Send to clients who are mothers 	<ul style="list-style-type: none"> Mother's Day (May 9) Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month) Armed Forces Day (May 15)
	<p>WEEK 3 5/16 - 5/22</p>	<ul style="list-style-type: none"> Automation: Financial Watch (typically sends the third Thursday of the month) 	<ul style="list-style-type: none"> Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month)
	<p>WEEK 4 5/23 - 5/29</p>		<ul style="list-style-type: none"> College Loans: Make Extra Payments
	<p>EVENTS</p>	<ul style="list-style-type: none"> College Planning Webinar - Hold a webinar about saving for college for clients and prospects with younger children or grandparents considering investing in education savings plans. Visit the Downloadables section of the Content Library for resources and presentations. Celebrate Armed Forces Day by writing and collecting letters to send to deployed troops. Organizations such as Operation Gratitude make it easy! 	

Quarterly Marketing Plan

MAY 2021



INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <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 5/2 - 5/8</p>		<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month)
	<p>WEEK 2 5/9 - 5/15</p>	<ul style="list-style-type: none"> • Mother's Day eCard (May 9): Send to clients who are mothers • 529, Roth, or Coverdell - Which One Is Right for You 	<ul style="list-style-type: none"> • Mother's Day (May 9) • Which Education Fund Is Right for You? • Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month) • Armed Forces Day (May 15)
	<p>WEEK 3 5/16 - 5/22</p>	<ul style="list-style-type: none"> • Automation: Financial Watch (typically sends the third Thursday of the month) 	<ul style="list-style-type: none"> • 529, Roth IRA or Coverdell Savings Plans • Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month)
	<p>WEEK 4 5/23 - 5/29</p>		<ul style="list-style-type: none"> • Estimating the Cost of College • Getting a Head Start on College Savings
	<p>EVENTS</p>	<ul style="list-style-type: none"> • College Planning Webinar - Hold a webinar about saving for college for clients and prospects with younger children or grandparents considering investing in education savings plans. Visit the Downloadables section of the Content Library for resources and presentations. • Celebrate Armed Forces Day by writing and collecting letters to send to deployed troops. Organizations such as Operation Gratitude make it easy! 	

Quarterly Marketing Plan

MAY 2021



INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <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 5/2 - 5/8</p>		<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month)
	<p>WEEK 2 5/9 - 5/15</p>	<ul style="list-style-type: none"> • Mother's Day eCard (May 9): Send to clients who are mothers • Automation: Retire Wise (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> • Mother's Day (May 9) • Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month) • Armed Forces Day (May 15)
	<p>WEEK 3 5/16 - 5/22</p>	<ul style="list-style-type: none"> • Give the Gift of a 529 Plan 	<ul style="list-style-type: none"> • Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month) • What Is a 529 Plan?
	<p>WEEK 4 5/23 - 5/29</p>		<ul style="list-style-type: none"> • Give the Gift of a 529 Plan • Soundbyte: The Bank of Grandma and Grandpa
	<p>EVENTS</p>	<ul style="list-style-type: none"> • College Planning Webinar - Hold a webinar about saving for college for clients and prospects with younger children or grandparents considering investing in education savings plans. Visit the Downloadables section of the Content Library for resources and presentations. • Celebrate Armed Forces Day by writing and collecting letters to send to deployed troops. Organizations such as Operation Gratitude make it easy! 	

Quarterly Marketing Plan

MAY 2021



INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <p>Living in Retirement</p> <p>Investing Stage 4 60+:</p> <p>Financial and lifestyle communications targeting retired clients</p>	<p>WEEK 1 5/2 - 5/8</p>		<ul style="list-style-type: none"> • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month)
	<p>WEEK 2 5/9 - 5/15</p>	<ul style="list-style-type: none"> • Mother's Day eCard (May 9): Send to clients who are mothers • Automation: Retire Wise (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> • Mother's Day (May 9) • Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month) • Armed Forces Day (May 15)
	<p>WEEK 3 5/16 - 5/22</p>	<ul style="list-style-type: none"> • Financial Gift Limitations 	<ul style="list-style-type: none"> • Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month) • How Much Can You Give?
	<p>WEEK 4 5/23 - 5/29</p>		<ul style="list-style-type: none"> • What Is Financial Gift Tax? • Soundbyte: The Bank of Grandma and Grandpa
	<p>EVENTS</p>	<ul style="list-style-type: none"> • College Planning Webinar - Hold a webinar about saving for college for clients and prospects with younger children or grandparents considering investing in education savings plans. Visit the Downloadables section of the Content Library for resources and presentations. • Celebrate Armed Forces Day by writing and collecting letters to send to deployed troops. Organizations such as Operation Gratitude make it easy! 	

Quarterly Marketing Plan

JUNE 2021



INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <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 5/30 - 6/5</p>	<ul style="list-style-type: none"> • Memorial Day eCard: This eCard is included in the Patriotic Holidays automation but can also be sent ad hoc • What Are the Limits for Your Retirement Plan? 	<ul style="list-style-type: none"> • Memorial Day (May 31) • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • How Much Can You Save for Retirement?
	<p>WEEK 2 6/6 - 6/12</p>		<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month) • Maximize Your Retirement Contributions
	<p>WEEK 3 6/13 - 6/19</p>	<ul style="list-style-type: none"> • Automation: Financial Watch (typically sends third Thursday of the month) 	<ul style="list-style-type: none"> • Flag Day (June 14) • Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month)
	<p>WEEK 4 6/20 - 6/26</p>	<ul style="list-style-type: none"> • Father's Day eCard (June 20): Send to clients who are fathers • Automation: Quarterly Market Outlook (typically posts the last week of the quarter) 	<ul style="list-style-type: none"> • Father's Day (June 20) • First Day of Summer (June 20) • Cetera Social Automation: Quarterly Market Outlook (typically posts the last week of the quarter)
	<p>WEEK 5 6/27 - 7/3</p>		<ul style="list-style-type: none"> • National Insurance Awareness Day (June 28)
	<p>EVENTS</p>	<ul style="list-style-type: none"> • IN THE ROOM (6/17: Speaker to be announced) - Give clients and prospects exclusive access to some of the most influential, entertaining and thoughtful personalities in American culture. Invite them to attend the second IN THE ROOM turnkey event of 2021. For more information, click here. 	

Quarterly Marketing Plan

JUNE 2021



INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <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 5/30 - 6/5</p>	<ul style="list-style-type: none"> • Memorial Day eCard: This eCard is included in the Patriotic Holidays automation but can also be sent ad hoc • What Are the Limits for Your Retirement Plan? 	<ul style="list-style-type: none"> • Memorial Day (May 31) • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month) • How Much Can You Save for Retirement?
	<p>WEEK 2 6/6 - 6/12</p>		<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month) • Maximize Your Retirement Contributions
	<p>WEEK 3 6/13 - 6/19</p>	<ul style="list-style-type: none"> • Automation: Financial Watch (typically sends third Thursday of the month) 	<ul style="list-style-type: none"> • Flag Day (June 14) • Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month)
	<p>WEEK 4 6/20 - 6/26</p>	<ul style="list-style-type: none"> • Father's Day eCard (June 20): Send to clients who are fathers • Automation: Quarterly Market Outlook (typically posts the last week of the quarter) 	<ul style="list-style-type: none"> • Father's Day (June 20) • First Day of Summer (June 20) • Cetera Social Automation: Quarterly Market Outlook (typically posts the last week of the quarter)
	<p>WEEK 5 6/27 - 7/3</p>		<ul style="list-style-type: none"> • National Insurance Awareness Day (June 28)
	<p>EVENTS</p>	<ul style="list-style-type: none"> • IN THE ROOM (6/17: Speaker to be announced) - Give clients and prospects exclusive access to some of the most influential, entertaining and thoughtful personalities in American culture. Invite them to attend the second IN THE ROOM turnkey event of 2021. For more information, click here. 	

Quarterly Marketing Plan

JUNE 2021



INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <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 5/30 - 6/5</p>	<ul style="list-style-type: none"> • Memorial Day eCard: This eCard is included in the Patriotic Holidays automation but can also be sent ad hoc 	<ul style="list-style-type: none"> • Memorial Day (May 31) • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month)
	<p>WEEK 2 6/6 - 6/12</p>	<ul style="list-style-type: none"> • Automation: Retire Wise (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month) • Selling Your Business: Transition Plan
	<p>WEEK 3 6/13 - 6/19</p>		<ul style="list-style-type: none"> • Flag Day (June 14) • Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month)
	<p>WEEK 4 6/20 - 6/26</p>	<ul style="list-style-type: none"> • Father's Day eCard (June 20): Send to clients who are fathers • Automation: Quarterly Market Outlook (typically posts the last week of the quarter) 	<ul style="list-style-type: none"> • Father's Day (June 20) • First Day of Summer (June 20) • Cetera Social Automation: Quarterly Market Outlook (typically posts the last week of the quarter)
	<p>WEEK 5 6/27 - 7/3</p>	<ul style="list-style-type: none"> • Selling Your Business? Have a Transition Strategy in Place: Send to clients who are business owners 	<ul style="list-style-type: none"> • National Insurance Awareness Day (June 28) • Selling Your Business: Steps to Take
	<p>EVENTS</p>	<ul style="list-style-type: none"> • IN THE ROOM (6/17: Speaker to be announced) - Give clients and prospects exclusive access to some of the most influential, entertaining and thoughtful personalities in American culture. Invite them to attend the second IN THE ROOM turnkey event of 2021. For more information, click here. 	

Quarterly Marketing Plan

JUNE 2021



INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <p>Living in Retirement</p> <p>Investing Stage 4 60+:</p> <p>Financial and lifestyle communications targeting retired clients</p>	<p>WEEK 1 5/30 - 6/5</p>	<ul style="list-style-type: none"> • Memorial Day eCard: This eCard is included in the Patriotic Holidays automation but can also be sent ad hoc 	<ul style="list-style-type: none"> • Memorial Day (May 31) • Cetera Social Automation: Monthly Recap (typically posts around the first or second of the month)
	<p>WEEK 2 6/6 - 6/12</p>	<ul style="list-style-type: none"> • Automation: Retire Wise (typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> • Cetera Social Automation: Retire Wise (typically posts the second Tuesday of the month)
	<p>WEEK 3 6/13 - 6/19</p>		<ul style="list-style-type: none"> • Flag Day (June 14) • Cetera Social Automation: Financial Watch (typically posts the third Thursday of the month) • Who Will Take Over Your Business
	<p>WEEK 4 6/20 - 6/26</p>	<ul style="list-style-type: none"> • Father's Day eCard (June 20): Send to clients who are fathers • Automation: Quarterly Market Outlook (typically posts the last week of the quarter) 	<ul style="list-style-type: none"> • Father's Day (June 20) • First Day of Summer (June 20) • Cetera Social Automation: Quarterly Market Outlook (typically posts the last week of the quarter)
	<p>WEEK 5 6/27 - 7/3</p>	<ul style="list-style-type: none"> • Optimize Your Business Value with Succession Planning: Send to clients who are business owners 	<ul style="list-style-type: none"> • National Insurance Awareness Day (June 28) • Are You Ready to Fully Retire?
	<p>EVENTS</p>	<ul style="list-style-type: none"> • IN THE ROOM (6/17: Speaker to be announced) - Give clients and prospects exclusive access to some of the most influential, entertaining and thoughtful personalities in American culture. Invite them to attend the second IN THE ROOM turnkey event of 2021. For more information, click here. 	

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 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 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.