

2025 QUARTERLY **MARKETING** ROADMAP

Helping independent advisors organize timely campaigns throughout the year



CONTENT



Financial Resources Group
Investment Services

Securities and advisory services offered through LPL Financial, Member FINRA/SIPC and a Registered Investment Advisor. Financial Resources Group Investment Services and LPL Financial are separate entities.

QUARTERLY OVERVIEW

Stay relevant and top-of-mind with your clients and prospects through timely marketing campaigns throughout the year. Leveraging LPL's Marketing Content Calendar in conjunction with content made available through FRG, FMG Suite, and LPL, you can implement monthly hot topics across multiple mediums to reach your target audiences. We hope you find this roadmap of quarterly themes and sample content helpful.

Please reach out to your dedicated Marketing Account Manager to implement today!

QUARTER

THEME

1

Financial Wellness for the New Year

- *Are You Financially Fit?*
- *Checkups are Good for Your Financial Health*
- *Her Financial Future, Her Way*

2

Financial Planning for Your Individual Goals

- *Is Social Security Enough?*
- *Financial Advice When You Open for Business*
- *Assessing Your Finances as a Homeowner*

3

Financial Awareness

- *Helping You Pursue Financial Independence*
- *Did You Know We Offer Investment Services?*
- *College Dreams Come True*

4

Family Planning & the Holidays

- *Make Financial Planning a Family Priority*
- *Benefits of Long-Term Care Planning*
- *Holiday Client Appreciation*

Note: Due to LPL and FMG regularly updating their content, some of the proposed pieces may not be available. If you find that your piece is no longer available, please contact your dedicated Marketing Account Manager for a replacement piece.

1ST QUARTER

JANUARY - Are You Financially Fit?

January is Financial Wellness Month (Targeting 30-50 yrs. Prospect Lists)

Suggested Activities & Examples

- Enhanced Branch Training - "Financial Planning" (FRG Library)
- Social Media Posts (At least 2x/week)
 - "National Financial Wellness Month" Social sequence(FMG Content Library)
 - "Are You Financially Fit?" (FRG Library)
- Print Collateral - "Are You Financially Fit?" (FRG Library)
- Email Marketing
 - "Financial Health Checkup" Prospect Letter (FMG Content Library)
 - "Organize Your Financial Life" (FRG Library)
- Website Activities
 - Website Banner - "Are You Financially Fit?" (FRG Library)
 - Lead Generation as Gated Content - "Unlocking the Treasures of Financial Wellness" ebook (FMG Content Library)
- Seminar - "Work, Life & Money: Creating a Living Financial Plan" (MOD)

ARE YOU FINANCIALLY FIT?

Maintaining good physical health requires discipline and adherence to a few simple habits, such as eating wisely, getting enough sleep, and exercising regularly. But did you know that the same basic formula can also apply to pursuing and managing financial fitness? If you're looking to shed some unwanted financial fat and build a potentially healthy financial future, all you need is a good attitude, a little bit of dedication, and a solid plan to get you on track.

Call me today for more information or to schedule a consultation.

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CHECKUPS ARE GOOD FOR YOUR FINANCIAL HEALTH

Like annual physicals, a yearly financial checkup can help uncover hidden problems, inspire you to set new goals, provide information you need to improve your health, and help make sure you're on track for your financial well-being.

I specialize in thoughtful and objective investment guidance aimed at keeping your finances and goals in shape.

Call me today for more information or to schedule a consultation.

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FEBRUARY - Checkups are Good for Your Financial Health

February is American Heart Month (Targeting 40-70 yrs. Prospect Lists)

Suggested Activities & Examples

- 10-Min Branch Training - "The Game of Life" (LPL Resource Center)
- Social Media Posts (At least 2x/week)
 - "Mental Health & Financial Wellness" (FMG Content Library)
 - "Checkups are Good for Your Financial Health" (FRG Library)
- Print Collateral - "Checkups are Good for Your Financial Health" (FRG Library)
- Email Marketing
 - Meet with a Financial Professional Annually" (FMG Content Library)
 - "Financial Health Checkup" letter (MOD)
- Website Activities
 - Website Banner - "Checkups are Good for Your Financial Health"
 - Lead Generation as Gated Content - "Annual Financial To-Do List" (FMG)
 - Blog/Vlog - "Annual Maintenance" (MOD)
- Seminar - "Financial Planning Basics" (FRG Library)

MARCH - Her Financial Future, Her Way

March is Women's History Month (Targeting 30-60 yrs. Prospect Lists)

Suggested Activities & Examples

- Branch Training - "Women and Investing" (FRG Library)
- Social Media Posts (At least 2x/week)
 - "Women in Investing" (FRG Library)
 - "Her Financial Future, Her Way" (FRG Library)
- Print Collateral - "Her Financial Future, Her Way" (FRG Library)
- Email Marketing
 - "The Quest for Financial Independence" article (MOD)
 - "Her Financial Future, Her Way" (FRG Library)
- Website Activities
 - Website Banner - "Her Life, Her Financial Future"
 - Video "The Long Run: Women And Retirement" (FMG Content Library)
 - Video "Bridging The Confidence Gap" (FMG Content Library)
- Seminar - "Women & Investing" (FRG Library)

HER FINANCIAL FUTURE, HER WAY...

Providing Professional Investment Guidance at Any Stage of a Woman's Life

Women are earning more, living longer, and taking charge of their financial futures like never before. Whether you're building wealth, growing a business, or planning for retirement, your financial journey is unique—and so is the way you approach it. It's time to provide tailored guidance that aligns with your goals, priorities, and the life you envision. No matter where you are in your financial journey, let's navigate it together with confidence and clarity.

Financial Review • Retirement Planning • Investment Planning • Legacy Planning • Maturing Funds • Small Business

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2ND QUARTER

APRIL - Is Social Security Enough?

April is National Social Security Month (Targeting 50-70 yrs. Prospect Lists)

Suggested Activities & Examples

- Enhanced Branch Training - "Maximizing Your Retirement Income" (FRG Library)
- Social Media Posts (At least 2x/week)
 - "Social Security and Your Retirement" SocialSequence (FMG Content Library)
 - "Is Social Security Enough?" (FRG Library)
- Print Collateral - "Is Social Security Enough" (FRG Library)
- Email Marketing
 - "Social Security Resources" (FMG Content Library)
 - "Better Together" article (MOD)
- Website Activities
 - Website Banner - "Is Social Security Enough" (FRG Library)
 - LeadGenerationasGatedContent-"TheBasicsofSocialSecurity"brochure(MOD)
 - Blog/Vlog - "Managing a Budget During Your Retirement" script (MOD)
- Seminar - "Preparing for Retirement" (MOD)

IS SOCIAL SECURITY ENOUGH?

Whether you dream of traveling the world in retirement or simply wish to maintain your current lifestyle, your income from Social Security alone may not be enough. A balanced retirement plan can help supplement your Social Security income and assist you in tracking unexpected expenses.

Call today to schedule a consultation. We'll figure out a plan to help you not just survive, but thrive in retirement.

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BUSINESS RETIREMENT PLANS

Choosing What's Best For Your Employees

Choosing a retirement plan may be one of the most important decisions you will make for you and your employees. Providing for your own financial future as well as that of your employees can potentially make a difference in your retirement lifestyle and help you attract and retain talented employees.

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MAY - Business Retirement Plans

May is Small Business Month (Targeting Business Owner Prospect Lists)

Suggested Activities & Examples

- Enhanced Branch Training - "Understanding Buy-Sell Agreements" (FRG Library)
- Social Media Posts (At least 2x/week)
 - "RetirementStrategiesforSmallBusinessOwners"(FMGContentLibrary)
 - "Business Retirement Plans" (FRG Library)
- Print Collateral - "Business Retirement Plans" (FRG Library)
- Email Marketing
 - "Retirement Plan Choices for Small Businesses" (FMG Content Library)
 - "Business Owners: Consider Offering Retirement Plans" letter (MOD)
- Website Activities
 - Website Banner - "Business Retirement Plans"
 - Lead Generation as Gated Content - "Open for Business" (MOD)
 - Blog/Vlog "Why It's Important to Support Small Businesses" (MOD)
- Seminar - "Retirement Plan Options for Small Businesses" (MOD)

JUNE - Assessing Your Finances as a Homeowner

June is National Homeowners Month (Targeting Recent Mortgages Prospect List)

Suggested Activities & Examples

- 10-Min Branch Training - "Identifying Money in Motion" (LPL Resource Center)
- Social Media Posts (At least 2x/week)
 - "Homeowners Insurance & Taxes" (FMG Content Library)
 - "Assessing Your Finances as a Homeowner" (FRG Library)
- Print Collateral - "Assessing Your Finances as a Homeowner" (FRG Library)
- Email Marketing
 - "Breaking Down the Real Costs of Purchasing a Home" article (MOD)
 - "Are You Financially Prepared to Buy a House?" (FRG Library)
 - Lead Generation Introductory Mortgage Letter (FRG Marketing Account Manager)
- Website Activities
 - Website Banner - "Assessing Your Finances as a Homeowner"
 - Blog/Vlog - "Considerations When Buying Your First Home" article (MOD)
- Seminar - "Managing Your Lifestyle" (FMG Content Library)

ASSESSING YOUR FINANCES AS A HOMEOWNER

The Benefits of Working With a Financial Advisor

Owning a home involves a myriad of financial considerations, from mortgage management and property taxes to home maintenance costs. A skilled financial advisor can provide insights into tax implications related to homeownership, identify potential risks and help homeowners plan for future expenses.

Additionally, advisors can guide homeowners in making strategic decisions about investments, retirement planning and debt management, ensuring that their home serves as a valuable asset in their overall wealth strategy.

Learn how I can help you alleviate your concerns as a homeowner and work toward financial confidence. Contact me to schedule a consultation today.

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4th QUARTER

OCTOBER - Make Financial Planning a Family Priority

October is Financial Planning Month (Targeting 70-90 yrs. Prospect Lists)

Suggested Activities & Examples

- Enhanced Branch Training - "Make Financial Planning a Family Priority" (FRG Resource Library)
- Social Media Posts (At least 2x/week)
 - "National Financial Planning Month" Social Sequence (FMG Content Library)
 - "Financial Planning Month" (LPL's Gainfully)
- Print Collateral - "Make Financial Planning a Family Priority" (FRG Resource Library)
- Email Marketing
 - "Using a Family LLC for Estate Planning" (FMG Content Library)
 - "Life Changes and So Should Your Financial Planning" (FRG Resource Library)
- Website Activities
 - Website Banner - "Make Financial Planning a Family Matter"
 - Lead Generation as Gated Content - "Family Financial Workshop Workbook" (FMG)
 - Blog/Vlog - "Protect the Financial Future of Your Family with a Will" script (MOD)



MAKE FINANCIAL PLANNING A FAMILY PRIORITY

Discussing estate and wealth transfer planning can feel overwhelming, but it's about more than just passing down financial assets—it's about preserving your values, intentions, and legacy. Clear communication and thoughtful planning can help your family navigate difficult moments with confidence and clarity.

With the right strategies and tools, you can ensure your hard-earned estate serves your loved ones well, now and for generations to come. Let's create a plan that reflects your vision and gives your family confidence.

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CONSIDER THE BENEFITS OF LONG-TERM CARE PLANNING

We all hope to live long, healthy and productive lives where we can take care of ourselves throughout our retirement years. Today, as people live longer and healthcare expenses continue to rise, the necessity for long-term care planning becomes more of a "when" than an "if" situation. By having a long-term care strategy in place earlier, you'll be better prepared for the tough financial, emotional and administrative decisions you and your loved ones may need to make.

Some of the benefits include:

- The knowledge you have a strong, proactive plan customized for your needs
- Preventing your family from reactively guessing at your care preferences, or needing to become your caregiver
- Safeguarding your retirement dollars from rising healthcare costs

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NOVEMBER - Benefits of Long-Term Care Planning

November is Long-Term Care Awareness Month (Targeting 45-65 yrs. Prospect Lists)

Suggested Activities & Examples

- Enhanced Branch Training - "Long-Term Care and the PPA" (FRG Resource Library)
- Social Media Posts (At least 2x/week)
 - "Review, Rethink, Repurpose" (FMG Content Library)
 - "Long-Term Care Planning" (LPL's Gainfully)
- Print Collateral - "Benefits of Long-Term Care Planning" (FRG Resource Library)
- Email Marketing
 - "The Pros and Cons of Long-Term Care Insurance" (FMG Content Library)
 - "Caring for Aging Parents" article (MOD)
- Website Activities
 - Website Banner - "Benefits of Long-Term Care Planning"
 - Lead Generation as Gated Content - "Planning for LTC" Workbook (FRG Library)
 - Blog/Vlog - "Medicaid vs. Medicare" article (MOD)
- Seminar - "Planning for LTC" (FRG Resource Library)

DECEMBER - Celebrating the Holidays (Targeting All Clients & Prospects)

(December We Celebrate the Holidays)

Suggested Activities & Examples

- Branch Activity - Holiday Themed Client Appreciation Event
- Mailing - Holiday Cards
- Social Media Posts (At least 2x/week)
 - "Happy Holiday" (FMG Content Library)
 - "Holiday Season" (LPL's Gainfully)
- Email Marketing
 - "Joy to the World" (FMG Content Library)
- Website Activities
 - Website Banner - "Happy Holidays"



You're Invited!

to a
Holiday Movie Event

DECEMBER 7th

Join us for a client appreciation event as we kick off the holiday season!

- Meet & Greet Santa Claus!
- Popcorn & Beverages Provided