2025 QUARTERLY MARKETING ROADMAP

Helping institutions organize timely campaigns throughout the year

Financial Resources Group
Investment Services

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.*

1 ST 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)

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 Fiancial 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)

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)
    - Lead Generation as Gated Content - "The Basics of Social Security" brochure (MOD)
    - Blog/Vlog - "Managing a Budget During Your Retirement" script (MOD)
- Seminar - "Preparing for Retirement" (MOD)

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)
    - "Retirement Strategies for Small Business Owners" (FMG Content Library)
    - "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)

3RD QUARTER

JULY - Helping You Pursue Financial Independence *(Targeting 30-70 yrs. Prospect Lists)*

July Observes National Financial Freedom Day & Independence

Suggested Activities & Examples

- Enhanced Branch Training - "Realize Your Dreams" (FRG Library)
- Social Media Posts (At least 2x/week)
  - "Helping You Pursue Financial Independence" (FMG Content Library)
  - "Investing in Your Future" Video Script (MOD)
- Print Collateral - "Helping You Pursue Financial Independence" (FRG Library)
- Email Marketing
  - "The Quest for Financial Independence" article (MOD)
  - "Make Sure Your Financial Planning Keeps Up with Life's Changes" (FRG Library)
- Website Activities
  - Website Banner - "Helping You Pursue Financial Independence" (FRG Library)
  - Blog/Vlog - "Planning for Your Financial Future" (MOD)
- Seminar - "Fortifying Your Financial Future" (MOD)

AUGUST - Did You Know We Offer Investment Services?

August is National Investors Month (Targeting All Prospects)

Suggested Activities & Examples

- 10-Min Branch Training - "Investing for All Stages of Life"
- Social Media Posts (At least 2x/week)
  - "Did You Know We Offer Investment Services?" (FRG Library)
  - "Begin Investing While Young" Video Script (MOD)
- Print Collateral - "Did You Know We Offer Investment Services?" (FRG Library)
- Email Marketing
  - "Investing through Different Stages of Life" (MOD)
  - "Educational Investing Insights" Email Sequence (FMG Content Library)
- Website Activities
  - Website Banner - "Did You Know We Offer Investment Services?" (FRG Library)
  - Lead Generation as Gated Content - "8 Timeless Principles of Investing" (FMG)
  - Blog/Vlog - "Investing for the Future" article (MOD)
- Seminar - "Investment Basics" (FRG Library)

SEPTEMBER - College Dreams Come True

September is College Savings Month (Targeting Parents/Grandparents Prospect Lists)

Suggested Activities & Examples

- Enhanced Branch Training - "College Savings Plan" (FRG Library)
- Social Media Posts (At least 2x/week)
  - "529 College Savings" Social Sequence (FMG Content Library)
  - "College Dreams Come True" (FRG Library)
- Print Collateral - "College Dreams Come True" (FRG Library)
- Email Marketing
  - "A Cheat Sheet for Sending Your Kid to College" (FMG Content Library)
  - "Help Make College Dreams Come True" brochure (MOD)
- Website Activities
  - Website Banner - "College Dreams Come True" (FRG Library)
  - Lead Generation as Gated Content - "The Basics of College Savings Planning" brochure (MOD)
  - Blog/Vlog - "Helping Younger Generations Prepare for the Future" letter (MOD)
- Seminar - "College Planning" (FRG Library)

4th QUARTER

OCTOBER - Make Financial Planning a Family Priority

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

<u>Suggested Activities & Examples</u>

- 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)

NOVEMBER - Benefits of Long-Term Care Planning

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

<u>Suggested Activities & Examples</u>

- 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)

<u>Suggested Activities & Examples</u>

- 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"