GUIDE TO PROMOTING "MAKING FINANCIAL PLANNING A FAMILY MATTER" CAMPAIGN

Suggested Activities & Examples
(Using 70-90 yrs. Prospect Lists)

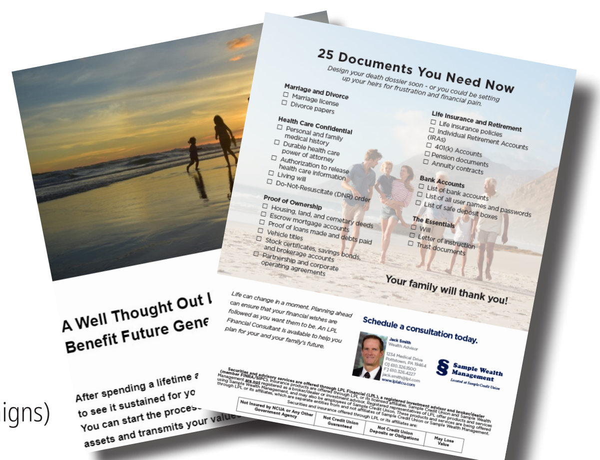
Available in both print and digital formats for multiple mediums

Branch Activities
- Enhanced Branch Training - *"Make Financial Planning a Family Matter"* (FRG Library/ Featured Campaigns)
- TV Screens - *"Make Financial Planning a Family Matter"* (FRG Library/Featured Campaigns)

Social Media Posts
- Social Media Content -*"Get Your Family in the Loop"* (FMG)
- Social Media Content - *"Fall is for Family Fun"* (Gainfully)
- Social Media Content -*"Make Financial Planning a Family Matter"* (FRG Library/ Featured Campaigns)

Website Activities
- Landing Page -*"Make Financial Planning a Family Matter"* (FRG Library/Featured Campaigns)
- Blog/Vlog Video Script - *"Protecting the Financial Future of Your Family with a Will"* (MOD)
- Website Banner -*"Make Financial Planning a Family Matter"* (FRG Library/Featured Campaigns)

Email Marketing
- Email -*"A Legacy is More Than Just Assets"* (FRG & FMG Libraries)
- Email -*"Talking to Your Family About Your Retirement Wishes"* (FRG Library/Featured Campaigns)
- Webinar Invite - *"Generational Wealth Planning"* (FRG Library/Featured Campaigns)



Print Collateral
- Workbook - *"Wealth Transfer Guide"* (FRG Library/Featured Campaigns)
- Legacy Keepsake - *"Our Family Legacy"* (FRG Library/Featured Campaigns)
- Letter - *"Take Care of Your Family With 25 Documents You Need Now"* (FRG Library/ Featured Campaigns)
- Checklist - *"25 Documents You Need Now"* (FRG Library/Featured Campaigns)
- Postcards/Flyers -*"Make Financial Planning a Family Matter"* (FRG Library/Featured Campaigns)

Seminar
- Seminar - *"Generational Wealth Transfer"*
  (Complete seminar kits available in FRG Library)

Themed Events
- Client Appreciation Idea #1 - *Family Pumpkin Patch Outing (Oct.)*
- Client Appreciation Idea #2 - *Family Breakfast (birthday or A-Client)*
- *Client Appreciation Idea #3 - *Thanksgiving Feast*
- *Client Appreciation Idea #4 - *Family Photo Day (around the holidays)*
- *Client Appreciation Idea #5 - *Mother's/Father's Day Brunch*
- *Client Appreciation Idea #6 - *Family Matinee Movie (kid-friendly)*
- *Educational Events - *Ask permission to reach out to beneficiaries for introduction and invite to age-specific or life milestone-related webinars*

FMG, Gainfully, MOD (Marketing on Demand) items can be found by entering the title of the piece in their search box in your respective accounts.

Due to MOD 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 assistance in finding a replacement piece.

FINANCIAL RESOURCES GROUP
Investment Services