

# Quarterly Marketing Plan

JANUARY 2020



INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <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>	<b>WEEK 1</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	<p><b>Paper Shredding Event</b></p> <p>This event goes well with the information security theme as an added way to protect against identity theft. Extend an invitation to children of clients or make it a community event.</p>
	<b>WEEK 2</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	
	<b>WEEK 3</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	
	<b>WEEK 4</b>	Fiscal Goals and Resolutions	<ul style="list-style-type: none"> <li>Financial Watch   January 2020 (typically available by the third Thursday of the month)</li> <li>The Five Basics of Financial Literacy (share article on your social site(s))*</li> </ul>	
	<b>WEEK 5</b>	Storing Critical Documents	<ul style="list-style-type: none"> <li><b>Data Privacy Day (Jan. 28)</b></li> <li>Tip: Watch Out for IRS Scammers</li> </ul>	
 <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>	<b>WEEK 1</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	<p><b>Paper Shredding Event</b></p> <p>This event goes well with the information security theme as an added way to protect against identity theft. Extend an invitation to children of clients or make it a community event.</p> <p><b>State of the Market Event</b></p> <p>Hold a coffee chat, open house, workshop, or webinar to discuss the outlook for the year.</p>
	<b>WEEK 2</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	
	<b>WEEK 3</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	
	<b>WEEK 4</b>	<ul style="list-style-type: none"> <li>Commentary   2020 Outlook Summary</li> <li>Fiscal Goals and Resolutions</li> </ul>	<ul style="list-style-type: none"> <li>Commentary   2020 Outlook Summary</li> <li>Financial Watch   January 2020 (typically available by the third Thursday of the month)</li> <li>The Five Basics of Financial Literacy (share on your social site(s))*</li> </ul>	
	<b>WEEK 5</b>	Storing Critical Documents	<ul style="list-style-type: none"> <li><b>Data Privacy Day (Jan. 28)</b></li> <li>TIP: Watch Out for IRS Scammers</li> <li>TIP: Review Your Beneficiaries</li> </ul>	

INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <p><b>Retirement Planning</b></p> <p>Investing Stage 3 <b>mid 50s to 70s:</b></p> <p>Communications for pre-retirees including planning considerations to retire confidently</p>	<b>WEEK 1</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	<p><b>Paper Shredding Event</b></p> <p>This event goes well with the information security theme as an added way to protect against identity theft. Extend an invitation to children of clients or make it a community event.</p> <p><b>State of the Market Event</b></p> <p>Hold a coffee chat, open house, workshop, or webinar to discuss the outlook for the year.</p> <p><b>Preparing for Retirement Workshop</b></p> <p>Offer a lunch and learn for clients and prospective clients.</p>
	<b>WEEK 2</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	
	<b>WEEK 3</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	
	<b>WEEK 4</b>	<ul style="list-style-type: none"> <li>• Commentary   2020 Outlook Summary</li> <li>• Estate Planning Tips and Checklist</li> </ul>	<ul style="list-style-type: none"> <li>• Commentary   2020 Outlook Summary</li> <li>• Retire Wise   January 2020 (typically available by the second Tuesday of the month)</li> </ul>	
	<b>WEEK 5</b>	Storing Critical Documents	<ul style="list-style-type: none"> <li>• <b>Data Privacy Day (Jan. 28)</b></li> <li>• TIP: Review Your Beneficiaries</li> <li>• TIP: Beware of IRS Scammers</li> </ul>	
 <p><b>Living in Retirement</b></p> <p>Investing Stage 4 <b>60+:</b></p> <p>Financial and lifestyle communications targeting retired clients</p>	<b>WEEK 1</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	<p><b>Paper Shredding Event</b></p> <p>This event goes well with the information security theme as an added way to protect against identity theft. Extend an invitation to children of clients or make it a community event.</p> <p><b>State of the Market Event</b></p> <p>Hold a coffee chat, open house, workshop, or webinar to discuss the outlook for the year.</p> <p><b>Healthcare in Retirement Workshop</b></p> <p>Offer a lunch and learn for clients and prospective clients.</p>
	<b>WEEK 2</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	
	<b>WEEK 3</b>	See Jan. 9 email from Cetera Advisor Marketing	See Jan. 9 email from Cetera Advisor Marketing	
	<b>WEEK 4</b>	<ul style="list-style-type: none"> <li>• Commentary   2020 Outlook Summary</li> <li>• Estate Planning Tips and Checklist</li> </ul>	<ul style="list-style-type: none"> <li>• Commentary   2020 Outlook Summary</li> <li>• Retire Wise   January 2020 (typically available by the second Tuesday of the month)</li> </ul>	
	<b>WEEK 5</b>	Storing Critical Documents	<ul style="list-style-type: none"> <li>• <b>Data Privacy Day (Jan. 28)</b></li> <li>• TIP: Beware of IRS Scammers</li> <li>• TIP: Stay on Guard from Scammers</li> </ul>	

# Quarterly Marketing Plan

FEBRUARY 2020



INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <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>	<b>WEEK 1</b>		Groundhog Day (Feb. 2)	<p><b>Paper Shredding Event</b></p> <p>This event goes well with the information security theme as an added way to protect against identity theft. Extend invitation to children of clients or make it a community event.</p>
	<b>WEEK 2</b>	Valentine's Day eCard (Feb. 14)	Valentine's Day (Feb. 14)	
	<b>WEEK 3</b>	Financial Watch   February 2020 (typically available by the third Thursday of the month)	<ul style="list-style-type: none"> <li><b>Presidents' Day (Feb. 17)</b></li> <li><b>Love Your Pet Day (Feb. 20):</b> Create your own post highlighting you (or a staff member) with the family dog/cat/etc. and include a personal note about Love Your Pet Day. Add this hashtag at the end of your post: #LoveYourPetDay. Or, use the pre-approved Love Your Pet Day post.</li> <li>Financial Watch   February 2020 (typically available by the third Thursday of the month)</li> </ul>	
	<b>WEEK 4</b>	<b>Email Sequence</b> (1 of 9; begins Feb. 25): Start Information Security Sequence (run time is one per month for nine months and frequency can be adjusted)	Did You Know? Student Loans	
	<b>WEEK 5</b>	N/A	N/A	
 <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>	<b>WEEK 1</b>	Monthly Recap (available early month, typically between the 4th and 7th); send to those contacts with an active interest in market activity	<ul style="list-style-type: none"> <li><b>Groundhog Day (Feb. 2)</b></li> <li>Monthly Recap (available early month, typically between the 4th and 7th)</li> </ul>	<p><b>Paper Shredding Event</b></p> <p>This event goes well with the information security theme as an added way to protect against identity theft. Extend invitation to children of clients or make it a community event.</p> <p><b>State of the Market Event</b></p> <p>Hold a coffee chat, open house, workshop, or webinar to discuss the outlook for the year.</p>
	<b>WEEK 2</b>	Valentine's Day eCard (Feb. 14)	Valentine's Day (Feb. 14)	
	<b>WEEK 3</b>	Financial Watch   February 2020 (typically available by the third Thursday of the month)	<ul style="list-style-type: none"> <li><b>Presidents' Day (Feb. 17)</b></li> <li><b>Love Your Pet Day (Feb. 20):</b> Create your own post highlighting you (or a staff member) with the family dog/cat/etc. and include a personal note about Love Your Pet Day. Add this hashtag at the end of your post: #LoveYourPetDay. Or, use the pre-approved Love Your Pet Day post.</li> <li>Financial Watch   February 2020 (typically available by the third Thursday of the month)</li> </ul>	
	<b>WEEK 4</b>	<b>Email Sequence</b> (1 of 9; begins Feb. 25): Start Information Security Sequence (run time is one per month for nine months and frequency can be adjusted)	Did You Know? Student Loans	
	<b>WEEK 5</b>	N/A	N/A	

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<p><b>Retirement Planning</b></p> <p>Investing Stage 3 <b>mid 50s to 70s:</b></p> <p>Communications for pre-retirees including planning considerations to retire confidently</p>	WEEK 1		<ul style="list-style-type: none"> <li>Groundhog Day (Feb. 2)</li> <li>Monthly Recap (available early month, typically between the 4th and 7th)</li> </ul>	<p><b>Paper Shredding Event</b></p> <p>This event goes well with the information security theme as an added way to protect against identity theft. Extend invitation to children of clients or make it a community event.</p>
	WEEK 2	<ul style="list-style-type: none"> <li>Retire Wise   February 2020 (typically available by the second Tuesday of the month)</li> <li>Valentine's Day eCard (Feb. 14)</li> </ul>	<ul style="list-style-type: none"> <li>Retire Wise   February 2020 (typically available by the second Tuesday of the month)</li> <li>Valentine's Day (Feb. 14)</li> </ul>	
	WEEK 3		<ul style="list-style-type: none"> <li>Presidents' Day (Feb. 17)</li> <li>Love Your Pet Day (Feb. 20): Create your own post highlighting you (or a staff member) with the family dog/cat/etc. and include a personal note about Love Your Pet Day. Add this hashtag at the end of your post: #LoveYourPetDay. Or, use the pre-approved Love Your Pet Day post.</li> </ul>	<p><b>State of the Market Event</b></p> <p>Hold a coffee chat, open house, workshop, or webinar to discuss the outlook for the year.</p> <p><b>Preparing for Retirement Workshop</b></p>
	WEEK 4	Email Sequence (1 of 9; begins Feb. 25): Start Information Security Sequence (run time is one per month for nine months and frequency can be adjusted)	26 Senior Restaurant Discounts	Offer a lunch and learn for clients and prospective clients.
	WEEK 5	N/A	N/A	
	<p><b>Living in Retirement</b></p> <p>Investing Stage 4 <b>60+:</b></p> <p>Financial and lifestyle communications targeting retired clients</p>	WEEK 1		<ul style="list-style-type: none"> <li>Groundhog Day (Feb. 2)</li> <li>Monthly Recap (available early month, typically between the 4th and 7th)</li> </ul>
WEEK 2		<ul style="list-style-type: none"> <li>Retire Wise   February 2020 (typically available by the second Tuesday of the month); send to new retirees</li> <li>Valentine's Day eCard (Feb. 14)</li> </ul>	<ul style="list-style-type: none"> <li>Retire Wise   February 2020 (typically available by the second Tuesday of the month)</li> <li>Valentine's Day (Feb. 14)</li> </ul>	
WEEK 3			<ul style="list-style-type: none"> <li>Presidents' Day (Feb. 17)</li> <li>Love Your Pet Day (Feb. 20): Create your own post highlighting you (or a staff member) with the family dog/cat/etc. and include a personal note about Love Your Pet Day. Add this hashtag at the end of your post: #LoveYourPetDay. Or, use the pre-approved Love Your Pet Day post.</li> </ul>	<p><b>State of the Market Event</b></p> <p>Hold a coffee chat, open house, workshop or webinar to discuss the outlook for the year.</p> <p><b>Healthcare in Retirement Workshop</b></p>
WEEK 4		Email Sequence (1 of 9; begins Feb. 25): Start Information Security Sequence (run time is one per month for nine months and frequency can be adjusted)	26 Senior Restaurant Discounts	Offer a lunch and learn for clients and prospective clients.
WEEK 5		N/A	N/A	

# Quarterly Marketing Plan

MARCH 2020



INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <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>	<b>WEEK 1</b>		Employee Appreciation Day (Mar. 6): Create your own post highlighting your staff, or use the pre-approved Employee Appreciation post	<p><b>Paper Shredding Event</b></p> <p>This event goes well with the information security theme as an added way to protect against identity theft. Extend invitation to children of clients or make it a community event.</p>
	<b>WEEK 2</b>	Designer Taste on a Dime	TIP: Good Debt vs. Bad Debt	
	<b>WEEK 3</b>	Financial Watch   March 2020 (typically available by the third Thursday of the month)	<ul style="list-style-type: none"> <li>St. Patrick's Day (Mar. 17)</li> <li>Financial Watch   March 2020 (typically available by the third Thursday of the month)</li> </ul>	
	<b>WEEK 4</b>	<b>Email Sequence (2 of 9):</b> Continue with the Information Security Sequence if already started the previous month	The Lowdown on Those Free Credit Scores (share article on your social site(s))*	
	<b>WEEK 5</b>		The Best Apps in Travel (share article on your social site(s))*	
 <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>	<b>WEEK 1</b>	Monthly Recap (available early month, typically between the 4th and 7th): send the Monthly Recap to those contacts with an active interest in market activity	<ul style="list-style-type: none"> <li>Monthly Recap (available early month, typically between the 4th and 7th)</li> <li>Employee Appreciation Day (Mar. 6): Create your own post highlighting your staff, or use the pre-approved Employee Appreciation post</li> </ul>	<p><b>Paper Shredding Event</b></p> <p>This event goes well with the information security theme as an added way to protect against identity theft. Extend invitation to children of clients or make it a community event.</p> <p><b>State of the Market Event</b></p> <p>Hold a coffee chat, open house, workshop, or webinar to discuss the outlook for the year.</p>
	<b>WEEK 2</b>		Tip: Good Debt vs. Bad Debt	
	<b>WEEK 3</b>	Financial Watch   March 2020 (typically available by the third Thursday of the month)	<ul style="list-style-type: none"> <li>St. Patrick's Day (Mar. 17)</li> <li>Financial Watch   March 2020 (typically available by the third Thursday of the month)</li> </ul>	
	<b>WEEK 4</b>	<b>Email Sequence (2 of 9):</b> Continue with the Information Security Sequence if already started the previous month	The Lowdown on Those Free Credit Scores (share article on your social site(s))*	
	<b>WEEK 5</b>	Quarterly Outlook (typically available by the last week of the quarter)	<ul style="list-style-type: none"> <li>The Best Apps in Travel (share article on your social site(s))*</li> <li>Quarterly Outlook (typically available the last week of the quarter)</li> </ul>	

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	WEEK 2	Retire Wise   March 2020 (typically sent the second Tuesday of the month)	<ul style="list-style-type: none"> <li>Healthcare Costs in Retirement (share article on your social site(s))*</li> <li>Retire Wise   March 2020 (typically available the second Tuesday of the month)</li> </ul>	
	WEEK 3		St. Patrick's Day (Mar. 17)	
	WEEK 4	Email Sequence (2 of 9): Continue with the Information Security Sequence if already started the previous month	Soundbyte: The Bank of Grandma and Grandpa	
	WEEK 5	Quarterly Outlook (typically sends the last week of each quarter)	<ul style="list-style-type: none"> <li>The Best Apps in Travel (share article on your social site(s))*</li> <li>Quarterly Outlook (typically available the last week of each quarter)</li> </ul>	
 <p><b>Living in Retirement</b></p> <p>Investing Stage 4 <b>60+:</b></p> <p>Financial and lifestyle communications targeting retired clients</p>	WEEK 1		<ul style="list-style-type: none"> <li>Monthly Recap (available early month, typically between the 4th and 7th)</li> <li><b>Employee Appreciation Day (Mar. 6):</b> Create your own post highlighting your staff, or use the pre-approved Employee Appreciation post</li> </ul>	<p><b>Paper Shredding Event</b></p> <p>This event goes well with the information security theme as an added way to protect against identity theft. Extend invitation to children of clients or make it a community event.</p> <p><b>State of the Market Event</b></p> <p>Hold a coffee chat, open house, workshop or webinar to discuss the outlook for the year.</p> <p><b>Healthcare in Retirement Workshop</b></p> <p>Offer a lunch and learn for clients and prospective clients.</p>
	WEEK 2	Retire Wise   March 2020 (typically sent the second Tuesday of the month); send to new retirees	Retire Wise   March 2020 (typically available by the second Tuesday of the month)	
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	WEEK 5	Quarterly Outlook (typically available the last week of each quarter)	<ul style="list-style-type: none"> <li>Quarterly Outlook (typically available the last week of each quarter)</li> <li>The Best Apps in Travel (share article on your social site(s))*</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.**



## Helpful Resources

Go to the Cetera Resources Page (<https://cetera.fmgsuite.com/experience/cetera-resources/>) to access the **Marketing Strategy & Best Practices** guide for marketing guidance and planning assistance. This is also where you can also find the **2020 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.



## Social Media Posts

- \*Web content, such as articles and videos, can be shared on your social media sites. Next to the communication title in MarketingCentral, select SHARE > SHARE on SOCIAL.
- Post to your social sites at least three times per week. A more consistent presence will ensure you are seen. Keep LinkedIn posts business-focused and consider sharing a monthly or quarterly blog, in addition to utilizing the pre-approved content in MarketingCentral. Consider posting 80% business content and 20% 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](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.

