

Quarterly Marketing Plan

APRIL 2020



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INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <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 3/30 - 4/4</p>		<ul style="list-style-type: none"> Financial Literacy Awareness Month (April 1): April is Financial Literacy Month. Share a photo and remarks about how you're helping to spread financial literacy this month. Also consider using the pre-approved Financial Literacy Month post. The Financial Literacy Crisis 	<p>Virtual Events</p> <p>Hold webinars and conference calls to address market activity and investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 2 4/5 - 4/11</p>	<ul style="list-style-type: none"> Email Sequence (1 of 6; begin April 6): Start Financial Perspectives (under 50) Sequence (run time is one per month for six months and frequency can be adjusted) Passover eCard (begins April 8): Send to clients who you know celebrate this holiday 	<ul style="list-style-type: none"> Passover (April 8) National Tax Day (April 8): Tax Day is April 15. Check for any updates from the Department of the Treasury or IRS and adjust posting date if needed. Achieving and Maintaining Good Credit 	
	<p>WEEK 3 4/12 - 4/18</p>	<ul style="list-style-type: none"> Easter eCard (April 12): Send to clients who you know celebrate this holiday Automation: Financial Watch April 2020 (set campaign under Marketing Automations; typically sends the third Thursday of the month) 	<ul style="list-style-type: none"> Easter (April 12) Automation: Financial Watch April 2020 (typically available by the third Thursday of the month)** Small Steps to Financial Health The Cycle of Investing 	
	<p>WEEK 4 4/19 - 4/25</p>	<ul style="list-style-type: none"> Email Sequence (3 of 9): Continue with the Information Security Sequence if already started in January 2020** 	<ul style="list-style-type: none"> Volunteer Week (April 19) Earth Day (April 22) Administrative Professionals Day (April 22): Take a photo of your administrative staff with a photo caption to express gratitude. 	
	<p>WEEK 5 4/26 - 5/2</p>		<ul style="list-style-type: none"> Motivation: Wayne Gretzky Quote Financial Aid for Students 101 	

* Recommendation carried over from week 5 of Q1 Quarterly Marketing Plan

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INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <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 3/30 - 4/4</p>	<ul style="list-style-type: none"> • Automation: Quarterly Outlook 2020 (set campaign under Marketing Automations); typically sends the last week of the quarter; send to those contacts with an active interest in market activity* • Automation: Monthly or Quarterly Recap (set campaign under Marketing Automations; available within the first week of the month, typically sends between the 1st and 2nd); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> • Automation: Quarterly Outlook (typically available the last week of the quarter)** • Automation: Quarterly Recap (available the first week of the month typically sends between the 1st and 2nd)** • Financial Literacy Awareness Month (April 1): April is Financial Literacy Month. Share a photo and remarks about how you are helping to spread financial literacy this month. Also consider using the pre-approved Financial Literacy Month post. • The Financial Literacy Crisis 	<p>Virtual Events</p> <p>Hold webinars and conference calls to address market activity and investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 2 4/5 - 4/11</p>	<ul style="list-style-type: none"> • Email Sequence (1 of 6; begin April 6): Start Financial Perspectives Sequence (two versions are available based on age: Financial Perspectives (under 50) and Financial Perspectives (over 50); run time for both is one per month for six months and frequency can be adjusted) • Passover eCard (begins April 8): Send to clients who you know celebrate this holiday 	<ul style="list-style-type: none"> • Passover (April 8) • National Tax Day (April 8): Tax Day is April 15. Check for any updates from the Department of the Treasury or IRS and adjust posting date if needed. • Achieving and Maintaining Good Credit 	
	<p>WEEK 3 4/12 - 4/18</p>	<ul style="list-style-type: none"> • Easter eCard (April 12): Send to clients who you know celebrate this holiday • Automation: Financial Watch April 2020 (set campaign under Marketing Automations; typically sends the third Thursday of the month) 	<ul style="list-style-type: none"> • Easter (April 12) • Automation: Financial Watch April 2020 (typically available by the third Thursday of the month)** • Small Steps to Financial Health • The Cycle of Investing 	
	<p>WEEK 4 4/19 - 4/25</p>	<ul style="list-style-type: none"> • Email Sequence (3 of 9): Continue with the Information Security Sequence if already started in January 2020** 	<ul style="list-style-type: none"> • Volunteer Week (April 19) • Earth Day (April 22) • Administrative Professionals Day (April 22): Take a photo of your administrative staff with a photo caption to express gratitude. 	
	<p>WEEK 5 4/26 - 5/2</p>	<ul style="list-style-type: none"> • Automation: Monthly Recap (the marketing automation sends the first week of the month, typically between the 1st and 2nd); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> • Automation: Monthly Recap (available early month, typically between the 1st and 2nd); send to those contacts with an active interest in market activity** • Motivation: Wayne Gretzky Quote 	

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INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <p>Retirement Planning</p> <p>Investing Stage 3 Mid 50s to 70s:</p> <p>Communications for pre-retirees including planning considerations to retire confidently</p>	<p>WEEK 1 3/30 - 4/4</p>	<ul style="list-style-type: none"> Automation: Quarterly Outlook 2020 (set campaign under Marketing Automations); typically available the last week of the quarter; send to those contacts with an active interest in market activity* 	<ul style="list-style-type: none"> Automation: Quarterly Outlook (typically available the last week of the quarter)** Automation: Quarterly Recap (available early month, typically between the 1st and 2nd); send to those contacts with an active interest in market activity** Financial Literacy Awareness Month (April 1): April is Financial Literacy Month. Share a photo and remarks about how you are helping to spread financial literacy this month. Also consider using the pre-approved Financial Literacy Month post. 	<p>Virtual Events</p> <p>Hold webinars and conference calls to address market activity and investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
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	<p>WEEK 3 4/12 - 4/18</p>	<ul style="list-style-type: none"> Easter eCard (April 12): Send to clients who you know celebrate this holiday Automation: Retire Wise April 2020 (set campaign under Marketing Automations); typically sends the second Tuesday of the month 	<ul style="list-style-type: none"> Easter (April 12) Automation: Retire Wise April 2020 (typically available by the second Tuesday of the month)** Small Steps to Financial Health A Fruitful Retirement: Social Security Benefit 	
	<p>WEEK 4 4/19 - 4/25</p>	<ul style="list-style-type: none"> Email Sequence (3 of 9): Continue with the Information Security Sequence if already started in January 2020** 	<ul style="list-style-type: none"> Volunteer Week (April 19) Earth Day (April 22) Administrative Professionals Day (April 22): Take a photo of your administrative staff with a photo caption to express gratitude. 	
	<p>WEEK 5 4/26 - 5/2</p>		<ul style="list-style-type: none"> Automation: Monthly Recap (available early month, typically between the 1st and 2nd); send to those contacts with an active interest in market activity** Motivation: Wayne Gretzky Quote Watch Out for Fraudsters! 	


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INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <p>Living in Retirement</p> <p>Investing Stage 4 60+:</p> <p>Financial and lifestyle communications targeting retired clients</p>	<p>WEEK 1 3/30 - 4/4</p>	<ul style="list-style-type: none"> Automation: Quarterly Outlook 2020 (set campaign under Marketing Automations); typically available the last week of the quarter; send to those contacts with an active interest in market activity* 	<ul style="list-style-type: none"> Automation: Quarterly Outlook (typically available the last week of the quarter)** Automation: Quarterly Recap (available early month, typically between the 1st and 2nd); send to those contacts with an active interest in market activity** Financial Literacy Awareness Month (April 1): April is Financial Literacy Month. Share a photo and remarks about how you are helping to spread financial literacy this month. Also consider using the pre-approved Financial Literacy Month post. 	<p>Virtual Events</p> <p>Hold webinars and conference calls to address market activity and investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
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	<p>WEEK 3 4/12 - 4/18</p>	<ul style="list-style-type: none"> Easter eCard (April 12): Send to clients who you know celebrate this holiday Automation: Retire Wise April 2020 (set campaign under Marketing Automations); typically sends the second Tuesday of the month; send to new retirees 	<ul style="list-style-type: none"> Easter (April 12) Automation: Retire Wise April 2020 (typically available by the second Tuesday of the month)** Small Steps to Financial Health 	
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	<p>WEEK 5 4/26 - 5/2</p>		<ul style="list-style-type: none"> Automation: Monthly Recap (available early month, typically between the 1st and 2nd); send to those contacts with an active interest in market activity** Motivation: Wayne Gretzky Quote Watch Out for Fraudsters! 	

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MAY 2020



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INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 <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 5/3 - 5/9</p>	<ul style="list-style-type: none"> Email Sequence (2 of 6): Continue with the Financial Perspectives (under 50) Sequence if already started the previous month** 	<ul style="list-style-type: none"> Financial Spring Cleaning Cinco de Mayo (May 5) Young Americans Pursuing Financial Self-Reliance 	<p>Virtual Events</p> <p>Hold webinars and conference calls to address market activity and investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 2 5/10 - 5/16</p>	<ul style="list-style-type: none"> Mother's Day eCard (May 10): Send to clients who are mothers 	<ul style="list-style-type: none"> Mother's Day (May 10) Armed Forces Day (May 16) Countdown to College 	
	<p>WEEK 3 5/17 - 5/23</p>	<ul style="list-style-type: none"> Automation: Financial Watch May 2020 (the marketing automation typically sends the third Thursday of the month) 	<ul style="list-style-type: none"> Notable Quotes: Babe Ruth Most Millennials Have No Idea How Their Parents Have Prepared for Retirement Automation: Financial Watch May 2020 (typically available by the third Thursday of the month)** 	
	<p>WEEK 4 5/24 - 5/30</p>	<ul style="list-style-type: none"> Email Sequence (4 of 9): Continue with the Information Security Sequence if already started in January 2020** 	<ul style="list-style-type: none"> Memorial Day (May 25) Identify Your Financial Goals 5 Ways to Teach Your Kid to Think Like an Entrepreneur 	

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MAY 2020



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 <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 5/3 - 5/9</p>	<ul style="list-style-type: none"> • Email Sequence (2 of 6): Continue with the Financial Perspectives Sequence if already started the previous month (versions available for under 50 and over 50)** • Automation: Themed Commentary: Dual Income Economy (set campaign under Marketing Automations); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> • Financial Spring Cleaning • Cinco de Mayo (May 5) • Automation: Themed Commentary: Dual Income Economy** 	<p>Virtual Events</p> <p>Hold webinars and conference calls to address market activity and investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 2 5/10 - 5/16</p>	<ul style="list-style-type: none"> • Mother's Day eCard (May 10): Send to clients who are mothers 	<ul style="list-style-type: none"> • Mother's Day (May 10) • Armed Forces Day (May 16) • Countdown to College • It May Be Time for a Financial Checkup 	
	<p>WEEK 3 5/17 - 5/23</p>	<ul style="list-style-type: none"> • Automation: Financial Watch May 2020 (the marketing automation typically sends the third Thursday of the month) 	<ul style="list-style-type: none"> • Notable Quotes: Babe Ruth • Most Millennials Have No Idea How Their Parents Have Prepared for Retirement • Automation: Financial Watch May 2020 (typically available by the third Thursday of the month)** • Did You Know? The Four Percent Rule 	
	<p>WEEK 4 5/24 - 5/30</p>	<ul style="list-style-type: none"> • Email Sequence (4 of 9): Continue with the Information Security Sequence if already started in January 2020** 	<ul style="list-style-type: none"> • Memorial Day (May 25) • Identify Your Financial Goals • 5 Ways to Teach Your Kid to Think Like an Entrepreneur 	

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INVESTING STAGE	WEEK	EMAIL	SOCIAL	EVENTS
 Retirement Planning Investing Stage 3 Mid 50s to 70s: Communications for pre-retirees including planning considerations to retire confidently	WEEK 1 5/3 - 5/9	<ul style="list-style-type: none"> Email Sequence (2 of 6): Continue with the Financial Perspectives (over 50) Sequence if already started the previous month** Automation: Themed Commentary: Dual Income Economy (set campaign under Marketing Automations); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> Financial Spring Cleaning Cinco de Mayo (May 5) Automation: Themed Commentary: Dual Income Economy** Is 67 the New Benchmark Retirement Age? 	Virtual Events Hold webinars and conference calls to address market activity and investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit , which walks you through best practices and resources.
	WEEK 2 5/10 - 5/16	<ul style="list-style-type: none"> Mother's Day eCard (May 10): Send to clients who are mothers Automation: Retire Wise May 2020 (the marketing automation typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> Mother's Day (May 10) Armed Forces Day (May 16) Automation: Retire Wise May 2020 (typically available by the second Tuesday of the month)** It May Be Time for a Financial Checkup 	
	WEEK 3 5/17 - 5/23		<ul style="list-style-type: none"> Notable Quotes: Babe Ruth Did You Know? The Four Percent Rule 	
	WEEK 4 5/24 - 5/30	<ul style="list-style-type: none"> Email Sequence (4 of 9): Continue with the Information Security Sequence if already started in January 2020** 	<ul style="list-style-type: none"> Memorial Day (May 25) Identify Your Financial Goals Did You Know? Grandparents Spending 	
 Living in Retirement Investing Stage 4 60+: Financial and lifestyle communications targeting retired clients	WEEK 1 5/3 - 5/9	<ul style="list-style-type: none"> Email Sequence (2 of 6): Continue with the Financial Perspectives (over 50) Sequence if already started the previous month** 	<ul style="list-style-type: none"> Financial Spring Cleaning Cinco de Mayo (May 5) Automation: Themed Commentary: Dual Income Economy** 	Virtual Events Hold webinars and conference calls to address market activity and investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit , which walks you through best practices and resources.
	WEEK 2 5/10 - 5/16	<ul style="list-style-type: none"> Mother's Day eCard (May 10): Send to clients who are mothers Automation: Retire Wise May 2020 (the marketing automation typically sends the second Tuesday of the month); send to new retirees 	<ul style="list-style-type: none"> Mother's Day (May 10) Armed Forces Day (May 16) Automation: Retire Wise May 2020 (typically available by the second Tuesday of the month)** It May Be Time for a Financial Checkup 	
	WEEK 3 5/17 - 5/23		<ul style="list-style-type: none"> Notable Quotes: Babe Ruth Volunteering in Retirement (share article on your social site(s))* 	
	WEEK 4 5/24 - 5/30	<ul style="list-style-type: none"> Email Sequence (4 of 9): Continue with the Information Security Sequence if already started in January 2020** 	<ul style="list-style-type: none"> Memorial Day (May 25) Did You Know? Grandparents Spending 	

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 <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 5/31 - 6/6</p>	<ul style="list-style-type: none"> Email Sequence (3 of 6): Continue with the Financial Perspectives (under 50) Sequence if already started in April 2020** 	<ul style="list-style-type: none"> 10 Tips for Thriftier Traveling Saving and Investing After College 	<p>Virtual Events</p> <p>Hold webinars and conference calls to address market activity and investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 2 6/7 - 6/13</p>		<ul style="list-style-type: none"> Addressing Key Money Issues Before Marriage Tips to Save Money When You Travel 	
	<p>WEEK 3 6/14 - 6/20</p>	<ul style="list-style-type: none"> Automation: Financial Watch June 2020 (the marketing automation typically sends the third Thursday of the month) 	<ul style="list-style-type: none"> Automation: Financial Watch June 2020 (typically available by the third Thursday of the month)** Flag Day (June 14) First Day of Summer (June 20) Notable Quotes: James Joyce 	
	<p>WEEK 4 6/21 - 6/27</p>	<ul style="list-style-type: none"> Father's Day eCard (June 21): Send to clients who are fathers Email Sequence (5 of 9): Continue with the Information Security Sequence if already started in January 2020** 	<ul style="list-style-type: none"> Father's Day (June 21) National Selfie Day (June 21): Take a selfie of you and your staff and include the hashtag #NationalSelfieDay 	
	<p>WEEK 5 6/28 - 7/4</p>	<ul style="list-style-type: none"> Independence Day eCard (July 4): This eCard is included in the Patriotic Holidays automation (the marketing automation sends on the day of the holiday) 	<ul style="list-style-type: none"> National Insurance Awareness Day (June 28) 3 Types of Insurance for Your Child Away at College Discounts on Auto Insurance Independence Day eCard (July 4) 	

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 <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 5/31 - 6/6</p>	<ul style="list-style-type: none"> • Email Sequence (3 of 6): Continue with the Financial Perspectives Sequence if already started in April 2020 (versions available for under 50 and over 50)** • Automation: Monthly Recap (the marketing automation sends early month, typically between the 1st and 2nd); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> • Automation: Monthly Recap (available early month, typically between the 1st and 2nd)** • 10 Tips for Thriftier Traveling 	<p>Virtual Events</p> <p>Hold webinars and conference calls to address market activity and investor concerns. Visit the Downloadables section of the Content Library for resources and presentations, including the Virtual Event Marketing Kit, which walks you through best practices and resources.</p>
	<p>WEEK 2 6/7 - 6/13</p>		<ul style="list-style-type: none"> • Addressing Key Money Issues Before Marriage • Tips to Save Money When You Travel 	
	<p>WEEK 3 6/14 - 6/20</p>	<ul style="list-style-type: none"> • Automation: Financial Watch June 2020 (the marketing automation typically sends the third Thursday of the month) 	<ul style="list-style-type: none"> • Automation: Financial Watch June 2020 (typically available by the third Thursday of the month)** • Flag Day (June 14) • First Day of Summer (June 20) • The Right Travel Insurance • Notable Quotes: James Joyce 	
	<p>WEEK 4 6/21 - 6/27</p>	<ul style="list-style-type: none"> • Father's Day eCard (June 21): Send to clients who are fathers • Email Sequence (5 of 9): Continue with the Information Security Sequence if already started in January 2020** • Automation: Quarterly Outlook (the marketing automation typically sends by the last week of the quarter); send to those contacts with an active interest in market activity 	<ul style="list-style-type: none"> • Father's Day (June 21) • National Selfie Day (June 21): Take a selfie of you and your staff and include the hashtag #NationalSelfieDay • Automation: Quarterly Outlook (typically available the last week of the quarter) ** 	
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	<p>WEEK 2 6/7 - 6/13</p>	<ul style="list-style-type: none"> Automation: Retire Wise June 2020 (the marketing automation typically sends the second Tuesday of the month) 	<ul style="list-style-type: none"> Automation: Retire Wise June 2020 (typically available by the second Tuesday of the month)** Tips to Save Money When You Travel Active Retirees Seek Adventurous Travel 	
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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 collections regularly as timely content not featured in this planner may be added.



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.

** 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

* 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

** **Cetera Social** Automation: Starting in April, you can automate many of the social media posts recommended in the Quarterly Marketing Plan. To activate, visit the Marketing Automations page and configure the new automation titled Cetera Social.

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 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 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

Event kits are coming soon to MarketingCentral's **Downloadables** section. You'll find brand new PowerPoint presentations along with promotional items such as event flyers, brochures, and more. These materials will be 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. More information is available on the **Cetera Resources** page, or contact cetera@fmgsuite.com or 858.312.5621.