# Quarterly Marketing Plan

OCTOBER 2020

| INVESTING STAGE | WEEK | EMAIL | SOCIAL |
|---|---|---|---|
| **Starting Out**<br>Investing Stage 1<br>**20s to 30s:**<br>Simply stated personal finance tips, ideal for connecting with the next generation of clients | **WEEK 1**<br>9/27 - 10/3<br>(Carried over from Q3 plan) | | • Your Emergency Fund: How Much Is Enough?<br>• Getting a Head Start on College Savings<br>• The Other Sure Thing<br>• **Cetera Social Automation**: Monthly Recap (typically posts around the first or second of the month) |
| | **WEEK 2**<br>10/4 - 10/10 | • **Automation**: Cetera Client Referral (October 8) | • National Cybersecurity Awareness Month<br>• Protect Yourself with ID360 |
| | **WEEK 3**<br>10/11 - 10/17 | • **Automation**: Financial Watch (typically sends third Thursday of the month) | • **Cetera Social Automation**: Retire Wise (typically posts the second Tuesday of the month)<br>• **Cetera Social Automation**: Financial Watch (typically posts the third Thursday of the month)<br>• National Get Smart About Credit Day (October 15) |
| | **WEEK 4**<br>10/18 - 10/24 | • **Email Sequence** (9 of 9): Continue with the Information Security sequence if already started in January 2020* | • Identity Theft and Internet Scams<br>• Paying Off a Credit Card |
| | **WEEK 5**<br>10/25 - 10/31 | | • Spotting Credit Trouble<br>• Happy Halloween (October 31): Personalize by adding a photo of you, your team or family in Halloween costumes |
| | **EVENTS** | • National Get Smart About Credit Day is October 15. Consider hosting a virtual webinar with tips to **managing and paying down credit**. Extend invitations to children and/or grandchildren of current clients (even minors) to learn the basics about managing credit. | |

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| **Building Wealth**<br>Investing Stage 2<br>**40s to early 50s:**<br>Communications focused on investors who are accumulating wealth and creating a road map for the future | WEEK 1<br>9/27 - 10/3<br>(Carried over from Q3 plan) | • **Automation**: Monthly Recap (typically sends on the first or second of the month) | • Your Emergency Fund: How Much Is Enough?<br>• Soundbyte: Working Longer May Afford You Larger Benefits<br>• The Other Sure Thing<br>• **Cetera Social Automation**: Monthly Recap (typically posts around the first or second of the month) |
| | WEEK 2<br>10/4 - 10/10 | • **Automation**: Cetera Client Referral (October 8) | • National Cybersecurity Awareness Month<br>• Protect Yourself with ID360 |
| | WEEK 3<br>10/11 - 10/17 | • **Automation**: Financial Watch (typically sends third Thursday of the month) | • **Cetera Social Automation**: Retire Wise (typically posts the second Tuesday of the month)<br>• **Cetera Social Automation**: Financial Watch (typically posts the third Thursday of the month)<br>• If You Connect It, Protect It<br>• National Get Smart About Credit Day (October 15) |
| | WEEK 4<br>10/18 - 10/24 | • **Email Sequence** (9 of 9): Continue with the Information Security sequence if already started in January 2020* | • Identity Theft and Internet Scams<br>• Caring for Aging Parents<br>• Review Your Beneficiaries |
| | WEEK 5<br>10/25 - 10/31 | • Don't Wait to Update Your Beneficiaries | • Did You Know? Beneficiaries<br>• It Was the Best of Times, It Was the Worst of Times<br>• Happy Halloween (October 31): Personalize by adding a photo of you, your team or family in Halloween costumes |
| | EVENTS | • National Get Smart About Credit Day is October 15. Consider hosting a virtual webinar with tips to **managing and paying down credit**. Extend invitations to children and/or grandchildren of current clients (even minors) to learn the basics about managing credit.<br>• **1-on-1 \| Beneficiary Review:** Consider offering a free beneficiary review to current clients to identify opportunities and uncover potential assets that they may consider transferring within their client portfolio. | |

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| | **WEEK 2**<br>10/4 - 10/10 | • **Automation**: Cetera Client Referral (October 8) | • Long-Term Care Planning Month<br>• National Cybersecurity Awareness Month<br>• Protect Yourself with ID360 |
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| | **WEEK 4**<br>10/18 - 10/24 | • **Email Sequence** (9 of 9): Continue with the Information Security sequence if already started in January 2020* | • Understanding Long-Term Care<br>• Identity Theft and Internet Scams<br>• Review Your Beneficiaries |
| | **WEEK 5**<br>10/25 - 10/31 | • Don't Wait to Update Your Beneficiaries | • Did You Know? Beneficiaries<br>• What to Look for in a Long-Term Care Policy<br>• Happy Halloween (October 31): Personalize by adding a photo of you, your team or family in Halloween costumes |
| | **EVENTS** | • **Workplace Financial Wellness Workshop: Healthcare in Retirement** (available in the **Downloadables section** of the Content Library)<br>• **1-on-1 \| Beneficiary Review:** Consider offering a free beneficiary review to current clients to identify opportunities and uncover potential assets that they may consider transferring within their client portfolio. | |

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| | **EVENTS** | • **Workplace Financial Wellness Workshop: Healthcare in Retirement** (available in the **Downloadables section** of the Content Library): Although your current clients most likely have these plans in place as part of your strategy together, this may be a good refresher and opportunity to extend the invite to their friends who may be nearing retirement.<br>• **1-on-1 \| Beneficiary Review:** Consider offering a free beneficiary review to current clients to identify opportunities and uncover potential assets that they may consider transferring within their client portfolio. | |

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| **Starting Out**<br>Investing Stage 1<br>**20s to 30s:**<br>Simply stated personal finance tips, ideal for connecting with the next generation of clients | **WEEK 1**<br>11/1 - 11/7 | • Tax-Loss Harvesting | • **Cetera Social Automation**: Monthly Recap (typically posts around the first or second of the month)<br>• Is Your Year-End Strategy in Place?<br>• What Is Tax-Loss Harvesting? |
| | **WEEK 2**<br>11/8 - 11/14 | • Veterans Day eCard \| Thank You (November 11): This eCard is included in the Patriotic Holidays automation but can also be sent ad hoc | • **Cetera Social Automation**: Retire Wise (typically posts the second Tuesday of the month)<br>• Veterans Day (November 11)<br>• Is Tax-Loss Harvesting for You? |
| | **WEEK 3**<br>11/15 - 11/21 | • **Automation**: Financial Watch (typically sends the third Thursday of the month) | • **Cetera Social Automation**: Financial Watch (typically posts the third Thursday of the month)<br>• Holiday Spending<br>• 'Tis the Season...to Protect Yourself |
| | **WEEK 4**<br>11/22 - 11/28 | • Thanksgiving eCard \| Holiday Wishes (November 25): This eCard is included in the General Year-End Holidays automation but can also be sent ad hoc | • Caring for Aging Parents<br>• Happy Thanksgiving (November 26)<br>• Lesser Known Provisions of the SECURE Act |
| | **EVENTS** | • **Thanksgiving Food Drive:** Set a week and a drop-off point at your office to collect non-perishable food items to help benefit those in need this holiday season.<br>• **1-on-1 \| Tax-Loss Harvesting:** Invite clients to have a conversation about their portfolio's performance this year (even reviewing assets that may not be part of your strategy) to decide whether tax-loss harvesting may benefit them before the end of the year. | |
| | **EXTRA TIP** | • **Don't forget to order your holiday cards:** Visit the Greeting Cards section of the Content Library to customize and order; you can schedule a future day for them to be delivered. | |

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| | **WEEK 2**<br>11/8 - 11/14 | • **Automation**: Retire Wise (typically posts the second Tuesday of the month)<br>• Veterans Day eCard \| Thank You (November 11): This eCard is included in the Patriotic Holidays automation but can also be sent ad hoc | • **Cetera Social Automation**: Retire Wise (typically posts the second Tuesday of the month)<br>• Veterans Day (November 11)<br>• Is Tax-Loss Harvesting for You? |
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| **Starting Out**<br>Investing Stage 1<br>**20s to 30s:**<br>Simply stated personal finance tips, ideal for connecting with the next generation of clients | **WEEK 1**<br>11/29 - 12/5 | • Will I Be Ok? Year-End Financial Checklist | • **Cetera Social Automation**: Monthly Recap (typically posts around the first or second of the month)<br>• Year-End Financial Checklist<br>• Year-End Charitable Gifting and You |
| | **WEEK 2**<br>12/6 - 12/12 | • Happy Holidays eCard \| Magical Season (December 11): This eCard is included in the General Year-End Holidays automation but can also be sent ad hoc | • **Cetera Social Automation**: Retire Wise (typically posts the second Tuesday of the month)<br>• Happy Hanukkah (December 10 – 18) |
| | **WEEK 3**<br>12/13 - 12/19 | • **Automation**: Financial Watch (typically sends third Thursday of the month) | • **Cetera Social Automation**: Financial Watch (typically posts the third Thursday of the month)<br>• IRA Withdrawals that Escape the 10% Tax Penalty |
| | **WEEK 4**<br>12/20 - 12/26 | | • Six Most Overlooked Tax Deductions<br>• Merry Christmas (December 25) |
| | **WEEK 5**<br>12/27 - 1/2 | • **Automation**: Quarterly Market Outlook (typically posts the last week of the quarter)<br>• New Year eCard \| Sparkle (December 31): This eCard is included in the General Year-End Holidays automation but can also be sent ad hoc | • **Cetera Social Automation**: Quarterly Market Outlook (typically posts the last week of the quarter)<br>• Happy New Year (January 1) |
| | **EVENTS** | • **Client Appreciation Holiday Happy Hour or Dinner:** Depending on the social regulations in your area, consider hosting a holiday happy hour or dinner to celebrate with your clients. To adhere to public health guidance, think about sending virtual gift cards for meal delivery services like UberEats or DoorDash and invite your clients to a virtual meeting or hangout.<br>• **1-on-1 or Virtual Webinar \| Will I Be Ok?** Some of your clients may still have unanswered questions due to the pandemic. Address these concerns and discuss their roadmap to navigate these unprecedented times as they prepare for a new year. | |

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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 and timely collections regularly as content not featured in this plan may be added.**

## Helpful Resources

Go to the Cetera Resources Page **(https://fmgsuite.com/marketingcentral/experience/cetera-resources)** to access the **Marketing Strategy & Best Practices** guide for marketing guidance and assistance planning your baseline strategy. 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

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 both business/educational and 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

**Workplace Financial Wellness Workshop Event Kits** are now available in the **Downloadables section** of the Content Library. You'll find PowerPoint presentations along with promotional items such as event brochures, handouts, and more. These materials are 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.