

# Quarterly Marketing Plan

Be more efficient and strategic with your marketing efforts by implementing this ready-to-use marketing plan each quarter that can easily be executed in MarketingCentral. Look for the recommended content in the monthly collections within the *Content Library* and pre-schedule your email and social posts.



## Automations

Simplify your marketing efforts by turning on automations by selecting Automated Marketing from the left navigation. These include Cetera Investment Management pieces, as well as holiday and birthday communications. For more information about available automations, click [here](#).



## Social Media Posts

Post to your social sites at least three times per week—more consistent activity will improve your digital presence (i.e search rankings). Note: social posts can't be targeted to a specific segment; consider prioritizing posts that engage your larger audience.



## Emails

Aim to send two to three marketing emails to your segmented audience groups each month. For market-related pieces, be sure to consider your audience and their interest in receiving ongoing updates and the frequency they wish to receive communication.



## Events

Aim to host at least two events per year and then consider a quarterly or monthly cadence. Recommendations include social, educational, or charitable/community-focused events. For additional event resources, check out the *Downloadables* section in MarketingCentral's *Content Library*, the [Connect2Investors turn-key event program](#), and the [Event Guide](#).



## Helpful Resources

Looking for additional guidance to assist with your baseline marketing strategy? Go to the [Cetera Resources Page](#) to access additional how-to guides, best practice information and supplemental marketing programs.



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JANUARY 2023

INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <b>Starting Out</b> Investing Stage 1 <b>20s to 30s:</b> Simply stated personal finance tips, ideal for connecting with the next generation of clients  <b>NEW Automation:</b> The Week Ahead Available to automate for email and social, typically posts on Monday every week	<b>WEEK 1</b> 1/1 - 1/7	<ul style="list-style-type: none"> <li>• <b>New Year eCard   New Beginnings (January 1):</b> This eCard is included in the General Year-End Holidays automation but can also be sent ad hoc</li> <li>• <b>Automation:</b> Investing Stage: Starting Out   5 Common Money Misconceptions (typically sends the first Wednesday or soon after; this email is included in the automation but can also be sent ad hoc)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Happy New Year (January 1)</b></li> <li>• <b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> </ul>
	<b>WEEK 2</b> 1/8 - 1/14	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Cetera Client Referral (typically sends the second week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• Common Money Misconception: I'll Never Get Rid of Debt</li> </ul>
	<b>WEEK 3</b> 1/15 - 1/21	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Financial Watch (typically sends the third Thursday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Happy Martin Luther King, Jr. Day (January 16)</b></li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<b>WEEK 4</b> 1/22 - 1/28		<ul style="list-style-type: none"> <li>• Common Money Misconception: I Can Live Off Social Security</li> </ul>
	<b>WEEK 5</b> 1/29 - 2/4	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Investing Stage: Starting Out   Understanding a 401(k) Plan (typically sends the first Wednesday or soon after; this email is included in the automation but can also be sent ad hoc)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li>• <b>Groundhog Day (February 2)</b></li> </ul>
	<b>EVENTS</b>	<ul style="list-style-type: none"> <li>• <b>2023 Outlook Webinar</b>—host a webinar (or in-person event) to share your outlook for the new year. The Annual Market Outlook from the Cetera Investment Management team can be found in the Market Updates &amp; Newsletters collection and corresponding presentation within the Downloadables section of the Content Library.</li> <li>• <b>Event In A Box:</b> Planning to host an event, but not sure what event might fit your objective? The <a href="#">Connect2Investors</a> program brings you interactive events to connect with clients, engage with prospects, and perhaps even learn a new skill—like mixology—or partake in some friendly competition. Gather your guests in person or host virtually. <a href="#">Pick your box!</a></li> </ul>	

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 <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> <p><b>NEW Automation:</b> The Week Ahead</p> <p>Available to automate for email and social, typically posts on Monday every week</p>	<p><b>WEEK 1</b> 1/1 - 1/7</p>	<ul style="list-style-type: none"> <li>• <b>New Year eCard   New Beginnings (January 1):</b> This eCard is included in the General Year-End Holidays automation but can also be sent ad hoc</li> <li>• <b>Automation:</b> Investing Stage: Building Wealth   Setting Long-Term Financial Goals (typically sends the first Wednesday or soon after; this email is included in the automation but can also be sent ad hoc)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Happy New Year (January 1)</b></li> <li>• <b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> </ul>
	<p><b>WEEK 2</b> 1/8 - 1/14</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Cetera Client Referral (typically sends the second week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• Setting and Pursuing Your Specific Financial Goals</li> </ul>
	<p><b>WEEK 3</b> 1/15 - 1/21</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Financial Watch (typically sends the third Thursday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Happy Martin Luther King, Jr. Day (January 16)</b></li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<p><b>WEEK 4</b> 1/22 - 1/28</p>		<ul style="list-style-type: none"> <li>• Common Financial Goals to Consider</li> </ul>
	<p><b>WEEK 5</b> 1/29 - 2/4</p>	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Investing Stage: Building Wealth   Qualified vs. Non-Qualified Accounts (typically sends the first Wednesday or soon after; this email is included in the automation but can also be sent ad hoc)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li>• <b>Groundhog Day (February 2)</b></li> </ul>
	<p><b>EVENTS</b></p>	<ul style="list-style-type: none"> <li>• <b>2023 Outlook Webinar</b>—host a webinar (or in-person event) to share your outlook for the new year. The Annual Market Outlook from the Cetera Investment Management team can be found in the Market Updates &amp; Newsletters collection and corresponding presentation within the Downloadables section of the Content Library.</li> <li>• <b>Event In A Box:</b> Planning to host an event, but not sure what event might fit your objective? The <a href="#">Connect2Investors</a> program brings you interactive events to connect with clients, engage with prospects, and perhaps even learn a new skill—like mixology—or partake in some friendly competition. Gather your guests in person or host virtually. <a href="#">Pick your box!</a></li> </ul>	

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 <b>Nearing Retirement</b> Investing Stage 3 <b>mid 50s to 70s:</b> Communications for pre-retirees including strategy considerations to retire confidently <b>NEW Automation:</b> The Week Ahead Available to automate for email and social, typically posts on Monday every week	<b>WEEK 1</b> 1/1 - 1/7	<ul style="list-style-type: none"> <li><b>New Year eCard   New Beginnings (January 1):</b> This eCard is included in the General Year-End Holidays automation but can also be sent ad hoc</li> <li><b>Automation:</b> Investing Stage: Nearing Retirement   5 Budget-Friendly Winter Activities (typically sends the first Wednesday or soon after; this email is included in the automation but can also be sent ad hoc)</li> </ul>	<ul style="list-style-type: none"> <li><b>Happy New Year (January 1)</b></li> <li><b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> </ul>
	<b>WEEK 2</b> 1/8 - 1/14	<ul style="list-style-type: none"> <li><b>Automation:</b> Retire Wise (typically sends the second Tuesday of the month)</li> <li><b>Automation:</b> Cetera Client Referral (typically sends the second week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>Budget-Friendly Winter Activities: Visit a Museum</li> </ul>
	<b>WEEK 3</b> 1/15 - 1/21		<ul style="list-style-type: none"> <li><b>Happy Martin Luther King, Jr. Day (January 16)</b></li> <li><b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<b>WEEK 4</b> 1/22 - 1/28		<ul style="list-style-type: none"> <li>Budget-Friendly Winter Activities: Host a Potluck</li> </ul>
	<b>WEEK 5</b> 1/29 - 2/4	<ul style="list-style-type: none"> <li><b>Automation:</b> Investing Stage: Nearing Retirement   ESPP Tax Rules (typically sends the first Wednesday or soon after; this email is included in the automation but can also be sent ad hoc)</li> </ul>	<ul style="list-style-type: none"> <li><b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li><b>Groundhog Day (February 2)</b></li> </ul>
	<b>EVENTS</b>	<ul style="list-style-type: none"> <li><b>2023 Outlook Webinar</b>—host a webinar (or in-person event) to share your outlook for the new year. The Annual Market Outlook from the Cetera Investment Management team can be found in the Market Updates &amp; Newsletters collection and corresponding presentation within the Downloadables section of the Content Library.</li> <li><b>Event In A Box:</b> Planning to host an event, but not sure what event might fit your objective? The <a href="#">Connect2Investors</a> program brings you interactive events to connect with clients, engage with prospects, and perhaps even learn a new skill—like mixology—or partake in some friendly competition. Gather your guests in person or host virtually. <a href="#">Pick your box!</a></li> </ul>	

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	<b>WEEK 3</b> 1/15 - 1/21		<ul style="list-style-type: none"> <li>• <b>Happy Martin Luther King, Jr. Day (January 16)</b></li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<b>WEEK 4</b> 1/22 - 1/28		<ul style="list-style-type: none"> <li>• How Inflation Can Impact Your Retirement Income</li> </ul>
	<b>WEEK 5</b> 1/29 - 2/4	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Investing Stage: Living in Retirement   Using a Tax Extension (typically sends the first Wednesday or soon after; this email is included in the automation but can also be sent ad hoc)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li>• <b>Groundhog Day (February 2)</b></li> </ul>
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	<b>WEEK 2</b> 2/12 - 2/18	<ul style="list-style-type: none"> <li><b>Automation:</b> Financial Watch (typically sends the third Thursday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>Super Bowl (February 12)</li> <li>Valentine's Day (February 14)</li> <li><b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li><b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<b>WEEK 3</b> 2/19 - 2/25		<ul style="list-style-type: none"> <li>Presidents' Day (February 20)</li> <li>Understanding a 401(k) Plan</li> </ul>
	<b>WEEK 4</b> 2/26 - 3/4	<ul style="list-style-type: none"> <li><b>Automation:</b> Investing Stage: Starting Out   Recognizing Suspicious Online Offers (typically sends the first Wednesday or soon after; this email is included in the automation but can also be sent ad hoc)</li> </ul>	<ul style="list-style-type: none"> <li>Using Your 401(k)</li> <li><b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li><b>Employee Appreciation Day (March 3):</b> Create your own post highlighting your staff, or use the pre-approved Employee Appreciation post</li> </ul>
	<b>EVENTS</b>	<ul style="list-style-type: none"> <li><b>Super Bowl Party</b>—invite a few of your clients who would enjoy watching the big game. Intimate events are a great way to continue deepening your client relationship. Plus, everyone loves delicious food, cold beverages, and great company.</li> <li>Not into football? Plan a <b>golf outing</b> for your clients who enjoy golf, or plan a <b>spa day</b> for your clients who could use a day of pampering. Small intimate events are often preferred by clients, and they are more likely to attend an event that is targeted and unique. When planning your event, have an objective in mind that will help determine who your invited audience will be and what experience will be most relevant to them.</li> </ul>	

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	<b>WEEK 3</b> 2/19 - 2/25		<ul style="list-style-type: none"> <li>Presidents' Day (February 20)</li> <li>Non-Qualified Retirement Accounts</li> </ul>
	<b>WEEK 4</b> 2/26 - 3/4	<ul style="list-style-type: none"> <li><b>Automation:</b> Investing Stage: Building Wealth   How a Roth IRA Can Be Beneficial (typically sends the first Wednesday or soon after; this email is included in the automation but can also be sent ad hoc)</li> </ul>	<ul style="list-style-type: none"> <li>Qualified Retirement Accounts</li> <li><b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li><b>Employee Appreciation Day (March 3):</b> Create your own post highlighting your staff, or use the pre-approved Employee Appreciation post</li> </ul>
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	<b>WEEK 3</b> 2/19 - 2/25		<ul style="list-style-type: none"> <li>Presidents' Day (February 20)</li> <li>What are the ESPP Tax Rules?</li> </ul>
	<b>WEEK 4</b> 2/26 - 3/4	<ul style="list-style-type: none"> <li><b>Automation:</b> Investing Stage: Nearing Retirement   Scholarship Information for Students (typically sends the first Wednesday or soon after; this email is included in the automation but can also be sent ad hoc)</li> </ul>	<ul style="list-style-type: none"> <li>How the ESPP Tax Rules Apply to You</li> <li><b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li><b>Employee Appreciation Day (March 3):</b> Create your own post highlighting your staff, or use the pre-approved Employee Appreciation post</li> </ul>
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	<b>WEEK 3</b> 2/19 - 2/25		<ul style="list-style-type: none"> <li>Presidents' Day (February 20)</li> <li>Can Anyone Get an Extension on Their Taxes?</li> </ul>
	<b>WEEK 4</b> 2/26 - 3/4	<ul style="list-style-type: none"> <li><b>Automation:</b> Investing Stage: Living in Retirement   Managing Your Finances in Your 70s and Beyond (typically sends the first Wednesday or soon after; this email is included in the automation but can also be sent ad hoc)</li> </ul>	<ul style="list-style-type: none"> <li>When to Use a Tax Extension</li> <li><b>Cetera Social Automation:</b> Monthly Recap (typically posts around the first or second of the month)</li> <li><b>Employee Appreciation Day (March 3):</b> Create your own post highlighting your staff, or use the pre-approved Employee Appreciation post</li> </ul>
	<b>EVENTS</b>	<ul style="list-style-type: none"> <li><b>Super Bowl Party</b>—invite a few of your clients who would enjoy watching the big game. Intimate events are a great way to continue deepening your client relationship. Plus, everyone loves delicious food, cold beverages, and great company.</li> <li>Not into football? Plan a <b>golf outing</b> for your clients who enjoy golf, or plan a <b>spa day</b> for your clients who could use a day of pampering. Small intimate events are often preferred by clients, and they are more likely to attend an event that is targeted and unique. When planning your event, have an objective in mind that will help determine who your invited audience will be and what experience will be most relevant to them.</li> </ul>	

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	<b>WEEK 2</b> 3/12 - 3/18	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Financial Watch (typically sends the third Thursday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• <b>St. Patrick's Day (March 17)</b></li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<b>WEEK 3</b> 3/19 - 3/25		<ul style="list-style-type: none"> <li>• Examples of Common Spam Risks</li> </ul>
	<b>WEEK 4</b> 3/26 - 4/1	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Quarterly Market Outlook (typically sends the last week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Quarterly Market Outlook (typically posts the last week of the quarter)</li> </ul>
	<b>EVENTS</b>	<ul style="list-style-type: none"> <li>• <b>Women and Investing Webinar</b>—host a webinar (or in-person event) for your female clients and prospects to coincide with Women's History Month. Share your outlook on how women face unique barriers that can make the goal to financial success more challenging to achieve. Explore these daunting challenges, and the investing pitfalls all investors should avoid when taking control of their financial futures. For detailed talking points, refer to the Women and Investing whitepaper within the Downloadables section of the Content Library.</li> <li>• It's that time of year again for some spring cleaning. Host a <b>Paper Shredding Event</b> to allow clients and prospects to drop off secure personal documents for safe disposal. Extend the invitation to their friends and family.</li> </ul>	

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MARCH 2023

INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <b>Building Wealth</b> Investing Stage 2 <b>40s to early 50s:</b> Communications focused on investors who are accumulating wealth and creating a road map for the future  <b>NEW Automation:</b> The Week Ahead Available to automate for email and social, typically posts on Monday every week	<b>WEEK 1</b> 3/5 - 3/11	<ul style="list-style-type: none"> <li>• <b>Celebrating Women We Admire:</b> This email sequence consists of 4 emails, deploying every five days to celebrate Women's History Month.</li> </ul>	<ul style="list-style-type: none"> <li>• Are There Different Types of Roth IRAs</li> <li>• Women's History Month</li> <li>• International Women's Day (March 8)</li> </ul>
	<b>WEEK 2</b> 3/12 - 3/18	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Financial Watch (typically sends the third Thursday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• St. Patrick's Day (March 17)</li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<b>WEEK 3</b> 3/19 - 3/25		<ul style="list-style-type: none"> <li>• The Potential Benefits of a Roth IRA</li> </ul>
	<b>WEEK 4</b> 3/26 - 4/1	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Quarterly Market Outlook (typically sends the last week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Quarterly Market Outlook (typically posts the last week of the quarter)</li> </ul>
	<b>EVENTS</b>	<ul style="list-style-type: none"> <li>• <b>Women and Investing Webinar</b>—host a webinar (or in-person event) for your female clients and prospects to coincide with Women's History Month. Share your outlook on how women face unique barriers that can make the goal to financial success more challenging to achieve. Explore these daunting challenges, and the investing pitfalls all investors should avoid when taking control of their financial futures. For detailed talking points, refer to the Women and Investing whitepaper within the Downloadables section of the Content Library.</li> <li>• It's that time of year again for some spring cleaning. Host a <b>Paper Shredding Event</b> to allow clients and prospects to drop off secure personal documents for safe disposal. Extend the invitation to their friends and family.</li> </ul>	

# Quarterly Marketing Plan



MARCH 2023

INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <b>Nearing Retirement</b>  Investing Stage 3 <b>mid 50s to 70s:</b>  Communications for pre-retirees including strategy considerations to retire confidently  <b>NEW Automation:</b> The Week Ahead  Available to automate for email and social, typically posts on Monday every week	<b>WEEK 1</b> 3/5 - 3/11	<ul style="list-style-type: none"> <li>• <b>Celebrating Women We Admire:</b> This email sequence consists of 4 emails, deploying every five days to celebrate Women's History Month.</li> </ul>	<ul style="list-style-type: none"> <li>• Scholarship Information Students Need to Know</li> <li>• Women's History Month</li> <li>• International Women's Day (March 8)</li> </ul>
	<b>WEEK 2</b> 3/12 - 3/18	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Retire Wise (typically sends the second Tuesday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• St. Patrick's Day (March 17)</li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<b>WEEK 3</b> 3/19 - 3/25		<ul style="list-style-type: none"> <li>• Understanding FAFSA</li> </ul>
	<b>WEEK 4</b> 3/26 - 4/1	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Quarterly Market Outlook (typically sends the last week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Quarterly Market Outlook (typically posts the last week of the quarter)</li> </ul>
	<b>EVENTS</b>	<ul style="list-style-type: none"> <li>• <b>Women and Investing Webinar</b>—host a webinar (or in-person event) for your female clients and prospects to coincide with Women's History Month. Share your outlook on how women face unique barriers that can make the goal to financial success more challenging to achieve. Explore these daunting challenges, and the investing pitfalls all investors should avoid when taking control of their financial futures. For detailed talking points, refer to the Women and Investing whitepaper within the Downloadables section of the Content Library.</li> <li>• It's that time of year again for some spring cleaning. Host a <b>Paper Shredding Event</b> to allow clients and prospects to drop off secure personal documents for safe disposal. Extend the invitation to their friends and family.</li> </ul>	

# Quarterly Marketing Plan



MARCH 2023

INVESTING STAGE	WEEK	EMAIL	SOCIAL
 <b>Living in Retirement</b> Investing Stage 4 <b>60+:</b> Financial and lifestyle communications targeting retired clients  <b>NEW Automation:</b> The Week Ahead  Available to automate for email and social, typically posts on Monday every week	<b>WEEK 1</b> 3/5 - 3/11	<ul style="list-style-type: none"> <li>• <b>Celebrating Women We Admire:</b> This email sequence consists of 4 emails, deploying every five days to celebrate Women's History Month.</li> </ul>	<ul style="list-style-type: none"> <li>• Accounting for Healthcare Services</li> <li>• <b>Women's History Month</b></li> <li>• <b>International Women's Day (March 8)</b></li> </ul>
	<b>WEEK 2</b> 3/12 - 3/18	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Retire Wise (typically sends the second Tuesday of the month)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Retire Wise (typically posts the second Tuesday of the month)</li> <li>• <b>St. Patrick's Day (March 17)</b></li> <li>• <b>Cetera Social Automation:</b> Financial Watch (typically posts the third Thursday of the month)</li> </ul>
	<b>WEEK 3</b> 3/19 - 3/25		<ul style="list-style-type: none"> <li>• Discussing Tax Reduction</li> </ul>
	<b>WEEK 4</b> 3/26 - 4/1	<ul style="list-style-type: none"> <li>• <b>Automation:</b> Quarterly Market Outlook (typically sends the last week of the quarter)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cetera Social Automation:</b> Quarterly Market Outlook (typically posts the last week of the quarter)</li> </ul>
	<b>EVENTS</b>	<ul style="list-style-type: none"> <li>• <b>Women and Investing Webinar</b>—host a webinar (or in-person event) for your female clients and prospects to coincide with Women's History Month. Share your outlook on how women face unique barriers that can make the goal to financial success more challenging to achieve. Explore these daunting challenges, and the investing pitfalls all investors should avoid when taking control of their financial futures. For detailed talking points, refer to the Women and Investing whitepaper within the Downloadables section of the Content Library.</li> <li>• It's that time of year again for some spring cleaning. Host a <b>Paper Shredding Event</b> to allow clients and prospects to drop off secure personal documents for safe disposal. Extend the invitation to their friends and family.</li> </ul>	