Sample Marketing Calendar

As part of our Referral Marketing Package, we create new content each month that goes out on your website, by email, and across social media. Here's a sample marketing calendar.

Month 1
Why I Became an Advisor
The goal of this post is to tell your story and let your network know why you do what you do. This creates a powerful and memorable connection with clients and prospects. The concept comes from Simon Sinek's book, *Start With Why*. This post is always the most popular post we create for advisors.

Month 2
What We Do & How We Can Help
Your clients may know what you've done for them, but they may not be aware of all of your services and what you do best. Reminding them allows them to refer you easier when they come across someone who needs your help.

Month 3
See a Sample Financial Plan
Prospects want to see what they are considering buying before they take the time to meet with you. The "Sample Financial Plan" post is often the most visited page on our advisors' websites.

Month 4
You Can Now Make an Appointment Online!
We help our clients get setup with online appointment scheduling technology so prospects can take the next step and schedule a 15 minute phone call with you, 24 hours per day!

Month 5
Please Join Us for Our Client Appreciation Event
As part of our Referral Marketing Package, we help promote your events by creating registration pages, sending invitation emails, and promoting on social media.

Month 6
We're Never Too Busy To Help Someone You Know

Do your clients know that you're taking on new clients? Many may think you're busy or at capacity. Reminding them that you're available to speak with their friends, family, and coworkers helps generate more referrals.

Month 7
What to Do During a Market Decline
It's critically important to stay in front of clients during good times and bad, since during market declines, clients tend to think about moving their money. Communicating proactively about market downturns is a great way to get referrals, since clients tend to forward emails like this to their nervous friends and family.

Month 8
Case Studies: Three Recent Clients We've Helped
Explaining who you serve, how you help, and the benefits of working with you is a critical foundation to your marketing strategy. We create this post and add it to your homepage.

Month 9
What's New At Our Firm?
It's important to update your network at least once a year on new happenings at your firm including team members, new technologies, and events you may be having.

Month 10
Please Take Our Annual Client Survey
When was the last time you did a client survey? Top advisors do client surveys each year because they know it's the best way to get feedback, identify problems, and ask for referrals.

Month 11
Our Year-End Economic Update
Near the holidays is a good time to update your network on the economy and your investment outlook. It's also a great time to remind them that you're taking on new clients as they start the busy season of mingling with friends and family.

Month 12
Happy Holidays from XYZ Financial Planning
The holidays are a great time for a personal update. Send out your family photos, let your network know what you're up to, and share what you're most thankful for. Invite clients and prospects to schedule an appointment in January to make updates to their financial plan.

Want to learn more? Email claire@indigomarketingagency.com today!