

Best Overall Fintech Software



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Our expertise is showing off yours.



Did You Know

Marketing On the Move: with FMG's Mobile App



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Director of Product and
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Elise Lambert



fmgsuite.com

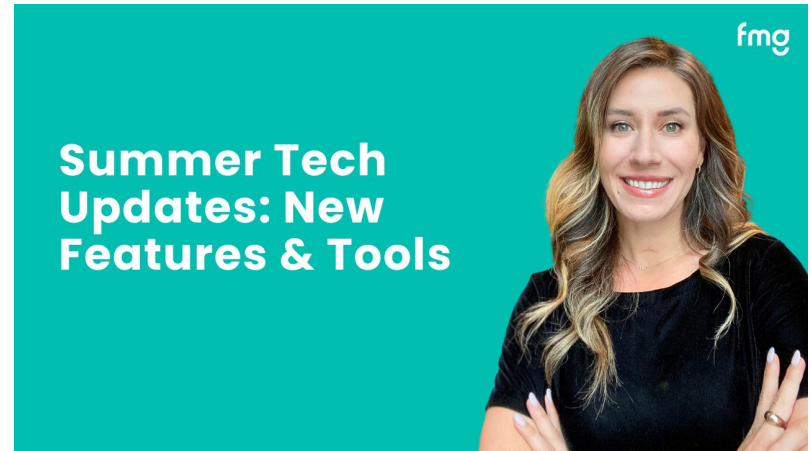
Housekeeping

Recording will be sent to you after the webinar.

Look out for the follow up email with today's handouts and slides

Login and follow along

Chat - feel free to chime in or minimize the chat box



Reminder: ICYMI July's DYK

FMG Product Updates & Features

- Email Upgrades
- Content Planning Updates
- Website Power-Ups
- Tons of Demo's

What We'll Discuss

Using our Mobile App

Calendar Scheduling

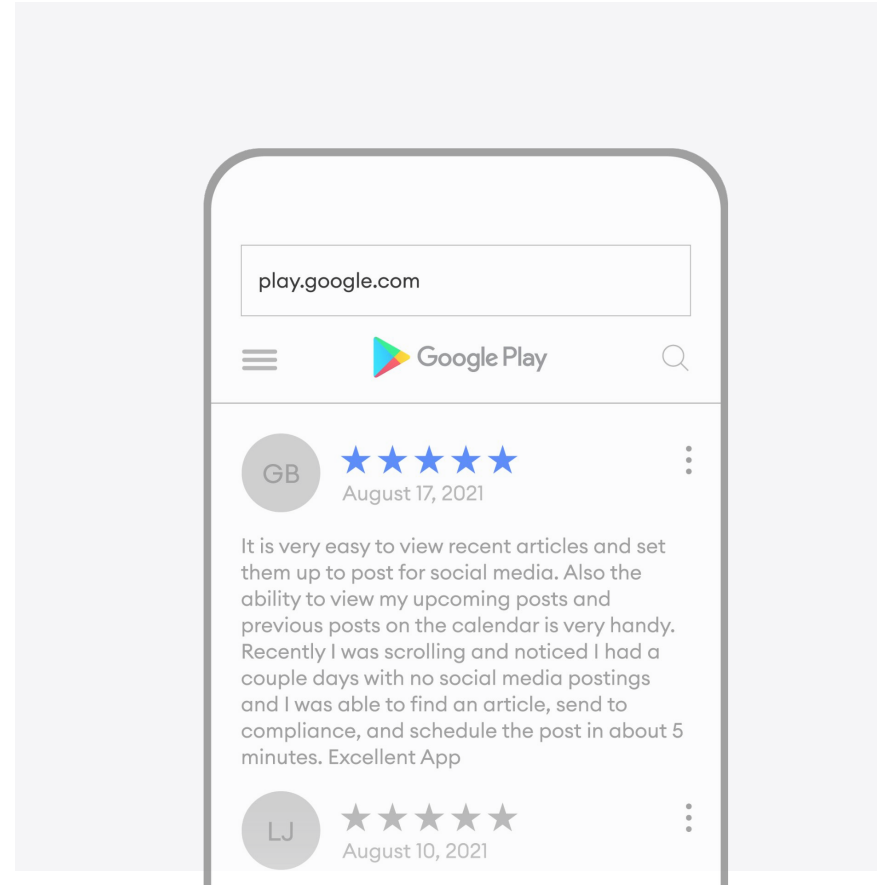
Content Planning

Live Demo

Download the FMG App!



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FMG Support Team
is on the call today!

Please use the Q&A Section of
the webinar to ask specific
question or submit a support
ticket



Q&A


Recommended Content: September

Content Planning

Holidays/Observances

September


- Labor Day
- Patriot Day

 **Social Profile Name**
@socialhandle


Happy Labor Day! 🇺🇸
Today, we take a moment to recognize and appreciate the hard work of individuals across the nation.

Whether you're relaxing at home or enjoying a well-deserved day off, I hope you're able to recharge and enjoy this special day.

To the builders, creators, and doers: Happy Labor Day! #LaborDay #Community #RelaxAndRecharge



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Hi {Firstname},

Much time has passed since the events of September 11, 2001, and while in some ways it feels like a lifetime ago, the memory remains painfully fresh in my mind.

An attack on U.S. soil. The loss of thousands of lives. In the wake of these events, we might have recoiled. But the people of this country, in the time that has followed, we've proven our courage, and our resilience.

Let us remember the precious lives that were lost that day. Let us remember the wounds that may never fully heal – like the wound at Pearl Harbor. But those wounds, though deep, make us stronger.



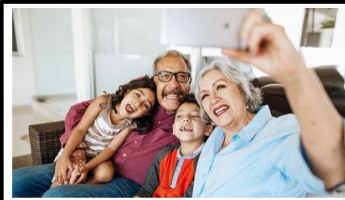
Greeting Card!

Content Planning

September is the Month of:

- College Savings (Article's & Infographic)
- Life Insurance Awareness (Email)
- National Hispanic Heritage (Email)
- National Assisted Living Week (Email)

A Cheat Sheet for Sending Your Kid to College



LIFESTYLE • READ TIME: 1 MIN

Hi (Firstname),

From Sept. 15 to Oct. 15 we celebrate National Hispanic Heritage Month. It's time to honor the culture and contributions of the Hispanic and Latin Americans that make up our great nation.

National Hispanic Heritage Month started as a week of recognition in 1968 and was expanded in 1988 into the month-long celebration we know of today. The dates were chosen to honor the independence days of several Hispanic and Latin American countries, including Costa Rica and El Salvador, among others.

As the United States has a rich history of immigration, the Hispanic community has made significant contributions to American heritage and opportunity to all.

Whether you spend time with your family or wish you an assisted living community every year.

College is a milestone in a child's life. It may be the first time he or she will live away from home. For many parents, the transition to college may be an experience loaded with emotions, so here are some tips to help with the transition.

The Parent-Child Dynamic Has Changed

As your child enters college, the relationship between you and your child will change. While you will still be a parent, your role has transitioned from "supervisor" to "mentor."

It's Simple

College is a big step. Not only will it be a new experience, but it's also a time when your child is becoming more independent. It's important to talk to your child about the transition and to help them prepare for the challenges ahead.

For more information, visit [www.fmg.com](#).



Social Profile Name

@socialhandle

Life have you curious? This month reminds us that it may be time to talk to your financial professional about life insurance. Whether you need to update your policy or find a new one, take this opportunity to learn more about life.

Several factors affect the cost and availability of life insurance, including age, health, and the type and amount of insurance purchased. Any guarantees associated with a policy are dependent on the ability of the issuing insurance company to continue making claim payments.

September is

LIFE INSURANCE
Awareness Month

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Hi (Firstname),

September 8-14, 2024 is National Assisted Living Week® (NALW).

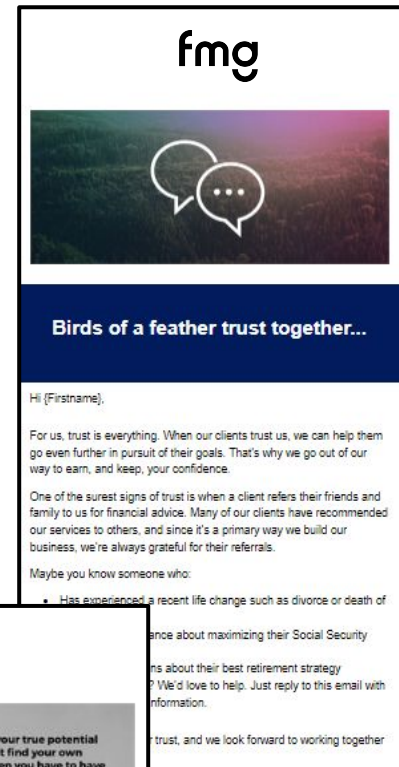
This time provides us a rare chance to recognize the role of assisted living communities in caring for our community's seniors and individuals with disabilities.

And if you feel like celebrating on a national level, check out NALW activities, photos, and videos on Facebook and Twitter using the hashtag #NALW.

Content Planning

September Themes:

- Fall Sport Kickoff/Start (Social)
- 30 days from Tax Extension Deadline (Social)
- Referral Ask (Email)
- U.S. Election (Social)



FMG Mobile App

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Demo

Business Texting



Use Texting as a Follow-up Tool

Text follow-up on paperwork requests sees documents returned within 5 minutes, leading to significantly improved client responsiveness. (My Rep Chat Internal Data)



Personalize Your Messaging

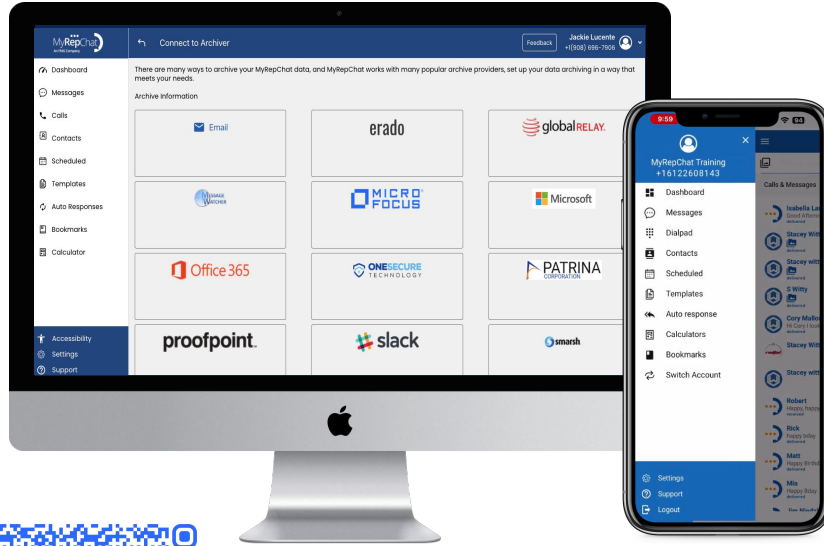
Personalized texts can increase engagement rates by up to 520%. Personalize by using client-specific information like name, recent transactions, and financial goals, or referencing relevant events and timelines.



Use Texting for Appointment Confirmations

Schedule and confirm appointments using tools like MyRepChat. Businesses see a 40% reduction in no-shows on average with text reminders.

We're better together.



Text and email are a strong marketing pair for financial advisors to contact clients directly while following regulations. Discover **MyRepChat**, a compliant text messaging platform that enhances and streamlines business communication*.

Text-Messaging - Fast Facts:

- 98% open rate
- Read rate within three minutes of delivery
- An average person in the US only completes six phone calls per day, but sends or receives 32 texts



Scan QR code to
request a Demo

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Today's Giveaways 🎉

Giveaway Time!

Enter to
win
FMG
swag



Save the date for our next webinar!

Did You Know -

Wednesday, Sept. 25th -
11 am PT / 2 pm ET



Do It For Me Marketing

- A monthly **Content Marketing** plan including customization tips
- **Exclusively Written** by Sam and Susan
- Your own dedicated **Marketing Concierge**
- Increase **Client** engagement, **Drip on Prospects and COIs**
- Take the **heavy lifting off** your plate

Scan to learn more about Do It For Me >>



Susan Theder
CMO/CXO, fmg



Samantha Russell
Chief Evangelist, fmg

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Do It For Me Calendar | September 2023

Key

- Email (E)
- Social media (S)
- Blog (B)
- FMD Automation

Check out the content recommendations. The default is to send emails to ALL contacts and social platforms that are connected. If you want to select a more targeted group, let us know in your email reply. Let us know if you've added any new clients this month so we can be sure to send them the New Client Welcome Series and add them to your ongoing campaigns.

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
27	28	29	30	1	2	3: College Savings Month
3	4 Labor Day	5 E. Understanding the September Effect	6 E. Understanding the September Effect	7 S. Understanding the September Effect	8 Monthly Market Insights	9 National 401(k) Day
10	11 E. 811 Day of Home Inspections	12 E. Top 10 Questions to Ask About Social Security	13 E. Social Security - Answers to Your Most Common Questions	14 E. Social Security - Answers to Your Most Common Questions	15 S. Life Insurance Awareness Month	16
17						
24						

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Recommended content

Blog

- September 6: Understanding the September Effect: What It Is and Why It Happens - Client Version
- September 12: Top 10 Questions High Net Worth Individuals Ask About Social Security
- September 20: A's Role in Shaping Our Tomorrow's Look Ahead

Email

- September 6: Understanding the September Effect: What It Is and Why It Happens - Client Version
- September 6: Understanding the September Effect: What It Is and Why It Happens - Prospect Version
- September 14: Social Security - Answers to Your Most Common Questions - Client Version
- September 14: Social Security - Answers to Your Most Common Questions - Prospect Version
- September 27: A's Role in Shaping Our Tomorrow - AB

Social Posts

- September 1: Hello to Live By - Vince Lombardi
- September 2: College Savings Month
- September 4: Labor Day
- September 7: The September Effect
- September 8: Life Insurance Awareness Month
- September 8: National 401(k) Day
- September 11: 9/11 Day of Remembrance
- September 14: Social Security - Answers to Your Most Common Questions
- September 16: Time to Book Flights for Thanksgiving
- September 22: World Alzheimer's Month
- September 22: Hello to Live By - Valerie Lobnitz
- September 28: A's Role in Shaping Our Tomorrow

View Complete List of All DFM Blog/Email/View Complete List of Niche/Special Content/Email

Additional Content Options - these can be used in addition to or swap out with other social posts

- September 15: National Heritage Month

FMD Automation

- Monthly Market Insights - Social Post and Email: Received the 1st of Each Month
- View of the Month - Email Only: Third Week of Each Month

Every month, add new clients to:

- New Client Welcome Series
- Monthly Market Insights
- Birthdays

Don't Forget About:

- Prospect FMD Sequence

Marketing Tip:

- Plan a Holiday Card Photo Shoot event for October. Invite clients (and their family) to bring their families and their fur babies to a beautiful location for professional photos. Food and drinks, jumps for kids. A chance to meet the next generation and give clients a "value-add moment" they'll surely share with friends!

Podcast Idea of the Month brought to you by ProsuMouth and fmg:

- Top 10 Questions High Net Worth Individuals Ask About Social Security: Top Post First Series
- For questions on podcasting please contact me@prosumouth.com

All content and timelines are subject to your Broker/Dealer compliance and approval.

Willing to give a testimonial about DFM? We would love that! Please click [here](#) for more information.

If you are looking to upgrade, scan the QR below!



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