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# Did You Know

**Communicate with  
Video: Easy Ways to  
Tap the Gold Mine**



## Elise Lambert

Director of Product and  
Enterprise Marketing, FMG



Elise Lambert



[fmgsuite.com](https://fmgsuite.com)



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# Reminder: January DYK

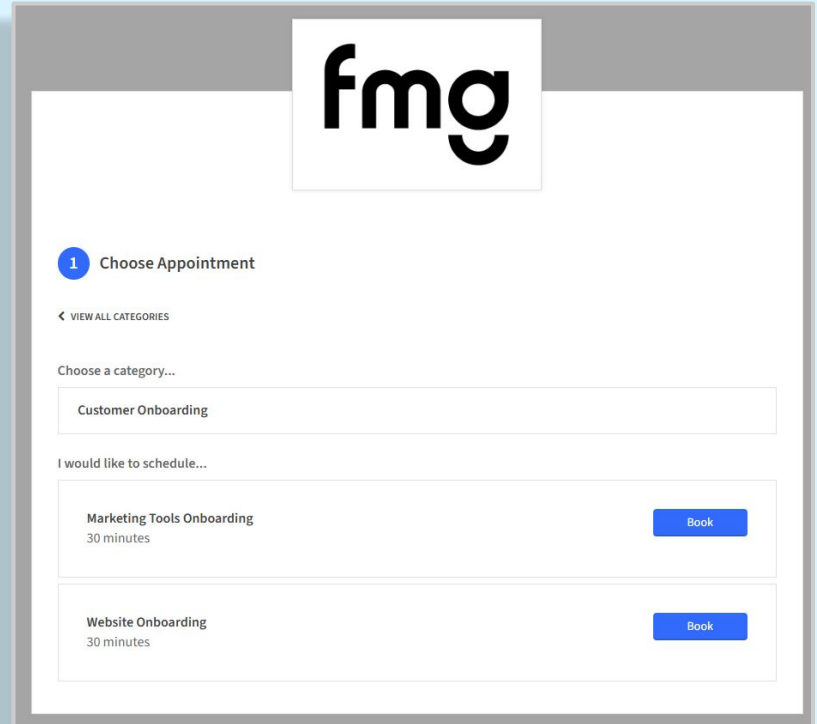
- From Website Clicks to Clients**
- Lead gen Hubpages
  - Using AI, video and social to get found online
  - Content strategy for online reach

# Have More Questions?

If you're looking for extra support after our webinar, schedule time with our Service Team!

Choose from:

- Marketing Tools Onboarding
- Website Onboarding



The screenshot shows a web interface for booking an appointment. At the top right is the 'fmg' logo. Below it, a section titled '1 Choose Appointment' contains a link '< VIEW ALL CATEGORIES'. A dropdown menu is open, showing 'Customer Onboarding' as the selected category. Below this, a section titled 'I would like to schedule...' lists two options: 'Marketing Tools Onboarding' (30 minutes) and 'Website Onboarding' (30 minutes). Each option has a blue 'Book' button to its right.

# Got New Product Ideas?

Customer feedback helps us continue to improve our platform in ways that are most impactful to you and your business.

Learn more about how to use the FMG Feedback Portal by scanning the QR code.



# What We'll Discuss

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Video marketing strategies  
to build trust with prospects  
and customers

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Your video marketing toolkit

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Recommended tools for  
maximizing your video efforts

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How to leverage your FMG tools  
with video across channels

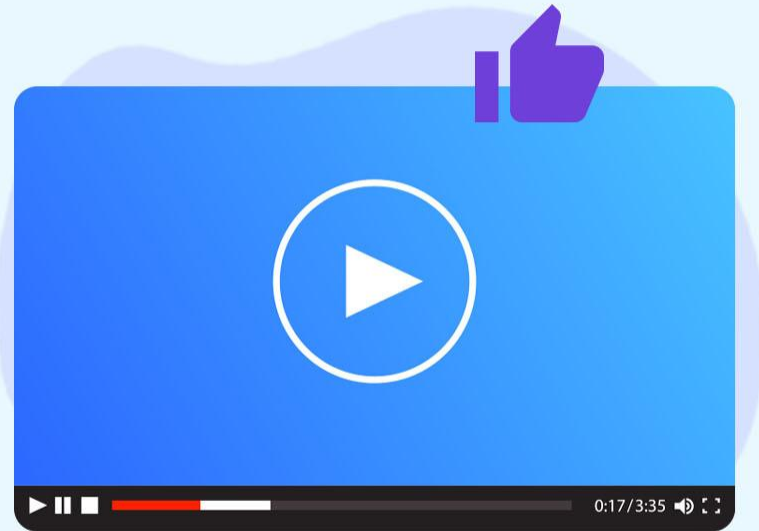
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REPLAY AVAILABLE!

# Video Marketing Made Simple

From Setup to Success in 2025



# Video Marketing Strategies to Build Trust With Prospects and Customers

# Video Content for SEO: Unlocking the Power of Visual Media

- **Increased Dwell Time**

Videos engage visitors, leading them to spend more time on a page, signaling valuable content to search engines.

- **Enhanced User Engagement**

Videos boost user interaction, sharing, and comments, which can improve visibility and search rankings.

- **Improved Click-Through Rates (CTR)**

Video thumbnails in search results attract more clicks, indicating content relevance to search engines.

- **Rich Snippets and Featured Snippets**

Videos can appear as enhanced listings, increasing visibility and driving more traffic.

- **Backlink Opportunities**

High-quality videos are more likely to be shared and linked, generating valuable backlinks that boost SEO.

- **Social Sharing and Visibility**

Videos are shareable on social media, increasing reach and driving traffic, indirectly supporting SEO.

- **Keyword Optimization**

Videos offer opportunities to optimize titles, descriptions, and tags for relevant keywords.

- **YouTube as a Search Engine**

Optimizing videos for YouTube taps into a large audience, driving traffic and enhancing SEO.

- **Mobile Optimization**

Videos cater to mobile users, enhancing user experience and supporting better rankings.

- **Enhanced Content Diversity**

Videos contribute to a diverse content strategy, improving overall site quality and catering to different user preferences.

# Why Video is Crucial for Financial Advisors

- **Establish Personal Connections**

Use video to create a more personal and authentic connection with clients, building trust and credibility.

- **Break Down Financial Topics Visually**

Leverage animations and storytelling to simplify complex financial concepts and make them more engaging for clients.

- **Capture Attention More Effectively**

Video content can capture the attention of clients more effectively compared to static text or images, fostering deeper connections and increased retention.

- **Showcase Knowledge and Thought Leadership**

Use video to demonstrate your expertise and position yourself as a knowledgeable authority in the financial services industry.

- **Address Specific Client Needs**

Create personalized video messages to address individual client concerns and enhance their overall experience.

- **Stand Out In a Crowded Market**

Use innovative video content to differentiate your services and demonstrate your commitment to modern communication.

- **Repurpose Content Across Platforms**

Maximize the value of your video content by repurposing it across various platforms and touchpoints to reach clients effectively.

## Enhance regular email communications

Incorporating video leads to a **300% increase in email click-through rates**.\*

- Add a personal message
- Use video content, such as FMG's Monthly Marketing Insights or Video of the Month to share expertise
- Add a video synopsis with your commentary of the content



**79%**

of consumers would rather watch a video about a product than read about it\*

# Effective Video Content for Financial Advisors

- **Introduction Videos**

Share your story and introduce your team to build trust with potential clients.

- **Educational Videos**

Provide valuable financial planning and investing information to educate your audience.

- **Q&A Sessions**

Address common client concerns and questions in a conversational format.

- **Webinar Snippets**

Leverage your existing webinar content by sharing highlights or key takeaways.

- **Market Insights**

Keep clients updated on the latest market trends and economic developments.

**81%** of people have been convinced to work with a business by watching their video\*

- <https://www.wyzowl.com/video-marketing-statistics/>

# New to video?

## Start with these simple ideas!

### Introducing Our Firm

Discover who we are and what we stand for on our Home Page.

### Meet Our Team

Get to know the faces behind the brand through our Bios, Our Story, and About Us pages.

# Video Content Themes for Expanding Strategy



## Quarterly Insights/vlog

Provide a quarterly update on industry trends, market changes, and new developments to keep your audience informed and engaged.



## Top Questions Answered Vlog

Address the most common questions and pain points your audience is facing through a video blog format.



## Timely Theme

Align your content with current events, seasonal changes, or important dates to make it more relevant and valuable.



## Complex Topics Simplified

Break down complex or technical subjects into easily digestible and understandable video content.

# Secret to Getting People to Watch

- Have a great thumbnail
- Hook people in first 15 seconds
- Create Catchy SEO Driven Title
- Transcribe the Video
- Favorite Video Tool - Vidyard



# Script vs. Outline

I recommend this



Samantha Russell

Video for Youtube Channel

Video Title: How to Get More Google Reviews | Financial Advisor Testimonials - SEC Ad Rule

To Post: Thursday, March 11th

Blog Post that inspired this video that we can link to:

<https://blog.twentyoverten.com/how-can-financial-advisors-get-more-google-reviews-6-simple-strategies/>

Headshots to use for thumbnail (sent via slack)

|

New SEC Ad Rule is poised to go into effect on May 4th, 2021.

Why Google Reviews? (we can link to blog post we have on this

<https://blog.twentyoverten.com/seo-for-financial-advisors-everything-you-need-to-know-about-google-reviews/>)

1. They help your SEO
2. They act as social proof - verify to outsiders that your business is legitimate

4 Strategies to To Get More Google Reviews:

1. Setup and Optimize your Google My Business Page ([link we can share](#))
2. Add a link in your email signature
3. Email all of your clients asking them to leave you a review - share a link directly making it easy for them
4. Include a Google Review Request in the footer of your website

**Visuals to Consider adding in:**

[Click Here to Rate Us](#)

This link will take you to Google to rate us publicly on the web. We appreciate your comments and recommend that you avoid

# How to Start Your Video: The Hook

- The first 5 seconds are CRUCIAL
- Don't introduce yourself first
- Start with a bold statement, fact or story
- OR, share exactly what someone will learn from watching the video



Samantha's **Quick Tip:**

[Start your video with a hook](#)

# How To Write Hooks

*That Truly Capture Attention*

Learn The 5 Types Of Hooks				
1 How I	2 How to	3 Start a story	4 Captivating quote	5 Surprising statistic
A personal guide on achieving a dream outcome.	A super comprehensive guide on achieving a skill/ outcome.	Share an inspirational story that motivates others or builds authority.	Use a topic-related quote that deeply resonates and captures attention.	Start off with a powerful statistic in relation to the post topic.
20 Powerful Phrases And Words To Use In Your Hooks				
1 Descriptive	2 Actionable	3 Fear Building	4 Scarcity/Urgency	5 Statistic/Number
"Killer" "Ultimate" "Rare" "Insane" "Secret"	"How to" "Why you should" "If you do this..." "When to" "Secret"	"Warning" "Do Not" "Stop" "Attention"	"Steal" "Don't miss" "Quickly"	"10X" "10 [ADJECTIVE]" "The 10 Best"

# 10 Templates to Write a Great Hook

## 10 Hook Templates

1 X biggest mistakes [TARGET AUDIENCE] make about [DREAM OUTCOME].

2 [Time frame] ago, I stopped [COMMON INDUSTRY MISTAKE]. I then achieved [POSITIVE OUTCOME].

3 10 Harsh [INDUSTRY] Truths After doing [SOCIAL PROOF/AUTHORITY].

4 Stop [COMMON INDUSTRY MISTAKE]. Instead, [USE MY SOLUTION].

5 Good [INDUSTRY SKILL] shouldn't be a mystery. It's a skill you can learn.

6 People are [CRAZY STATISTIC] after doing [POST TOPIC]. Here is the guide to nailing [POST TOPIC].

7 The best [INDUSTRY] lesson you'll receive today: [From someone who has [AUTHORITY/SOCIAL PROOF]].

8 [SUPER FAMOUS QUOTE ABOUT TOPIC]. Here is the Ultimate guide to [ACHIEVING DREAM OUTCOME].

9 [TOPIC] is not about [MISCONCEPTION]. It's about [SOLUTION].

10 The ability to [DO X] is a superpower.

## Example Hook Ideas

1. I've helped 100 people retire. Here's what most of them said they wish they'd done before retirement
2. Before you apply for social security, watch this
3. Scared about being bored in retirement? Try this
4. If you have RSUs, avoid a huge surprise tax bill with this tax planning strategy
5. If you have a net worth over 2 Million, here's what you need to know before you retire

## Example Hook Ideas, Part 2

6. What NOT to do when claiming social security
7. If you are under 45 and making \$150K or more a year, you need to know this
8. Struggling with high tax bills? Watch this
9. Business owner with less than 50 employees? You need to know this about getting health insurance for staff
10. The absolute WORST advice about saving money for retirement

# Your Video Marketing Toolkit



## Video Checklist

Keep this checklist handy to ensure you're creating high-quality, impactful videos that **showcase your expertise and connect with your audience**

### Camera

- Smartphone or Webcam
  - Optional: tripod for stable recording

### Location

- Quiet, minimal background distractions, natural light source (near a window)
- Professional, clean background (but don't skimp on any personal touches - people love seeing art pieces, autographed jerseys or family photos in the background)

### Content

- Script development
- Identify any graphics/pop-ups to include

### Recording Best Practices

- Business casual attire (or what you'd wear in a client meeting)
- Speak conversationally
- Use storytelling techniques (pretend you're talking to a friend)
- PRACTICE and re-record as many times as you'd like (nobody needs to know how many takes it took)

### Editing

- [Tools](#) like Veed make it really easy to edit
- Quick edits to
  - Remove dead space at beginning/end
  - Check audio levels
  - Add subtitles
  - Add any visual elements

### Post-Production

- Don't forget to submit to compliance and obtain necessary approvals
- Create [video thumbnail](#) and write a 1-2 sentence description
- Distribute:
  - YouTube
  - Website
  - Email newsletter
  - Social media

get

d a  
ewhere,



“

know your high school looks just like my high school in my family when I was growing up and I have an emotional connection that you make [video]. It's an interesting way to have a personal connection with others

add  
anagement

### on Offer:

1-minute consultation tailored to your business to show you exactly how we can help you with the effort on your part.

w

## Camera

- Smartphone or Webcam
  - Optional: tripod for stable recording

## Location

- Quiet, minimal background distractions, natural light source (near a window)
  - If you don't have a natural light source, purchase a ring light instead
- Professional, clean background (but don't skimp on any personal touches – people love seeing art pieces, autographed jerseys or family photos in the background)

## Content

- Outline development
    - Speak from an outline versus a word-for-word script to sound natural
  - Identify any graphics/pop-ups to include
  - Not sure where to start? Base your video content on existing blogs, articles, or market commentaries for inspiration and structure
  - Always start with an eye-catching hook
-

## Recording Best Practices

- Dress in business casual attire (or what you'd wear in a client meeting)
- Speak conversationally
- Use storytelling techniques (pretend you're talking to a friend)
- PRACTICE and re-record as many times as you'd like (nobody needs to know how many takes it took)
- Even if you mess up, keep recording

## Editing

- Tools like [Veed](#) or [Describe](#) make it really easy to edit
- Make edits to:
  - Remove dead space at beginning/end
  - Check audio levels
  - Add subtitles
  - Add any visual elements like text to beginning/end

**300%**

Incorporating video leads to a 300% increase in email click-through rates\*



## Post-Production

- Don't forget to submit to compliance and obtain necessary approvals
- Create [video thumbnail](#) and write a 1-2 sentence description
- Distribute:
  - YouTube
    - Use [Tube Buddy](#) for SEO
  - Email
    - Put {Video} in the subject line
  - Website
  - Social media

## Guide to Video Orientation

### Horizontal

- Website
- Email
- Regular Youtube

### Vertical

- Instagram Reels and Stories
- YouTube Shorts

### Both

- LinkedIn



80%


Incorporating video on landing pages results in an 80% rise in conversion rates\*

# How to Leverage Your FMG Tools With Video Across Channels

# How to Share Your Video: Email

- Make sure you put {VIDEO} in subject line
- Choose a great thumbnail to get people to watch
- **Horizontal** for Email!

## Upload A Video



What should be on the homepage of your website?

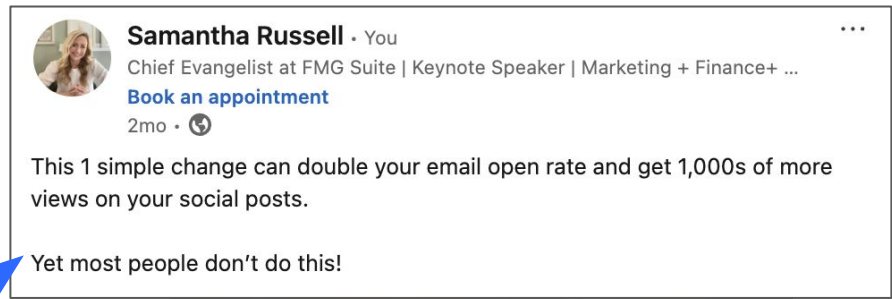
Timestamp

6

Never Mind Select Thumbnail

# How to Share Your Video: Social Media

- The “hook” you write can be different than the text on the video thumbnail
- **Vertical** for Social!

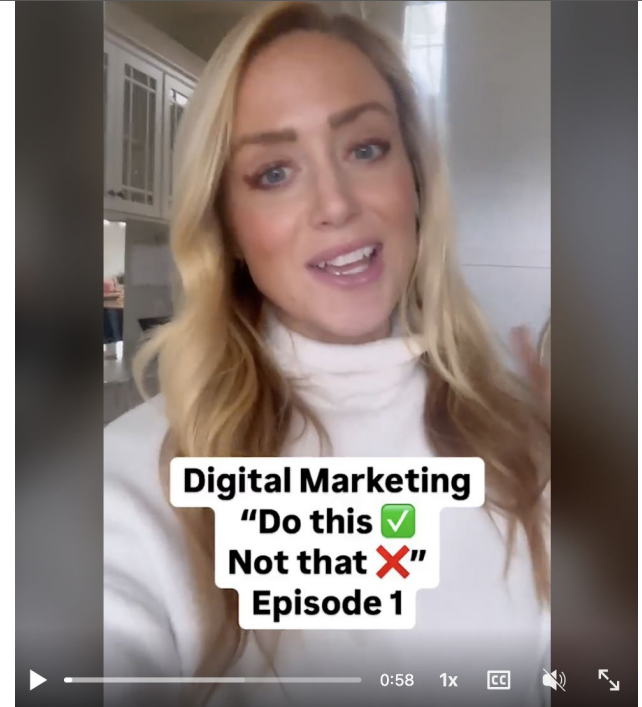


A screenshot of a social media post from Samantha Russell. The post includes a profile picture, her name, title, a link to book an appointment, and a text-based hook. A blue arrow points from the text 'Yet most people don't do this!' in the video thumbnail to the text in the post.

**Samantha Russell** · You  
Chief Evangelist at FMG Suite | Keynote Speaker | Marketing + Finance+ ...  
[Book an appointment](#)  
2mo · 🌐

This 1 simple change can double your email open rate and get 1,000s of more views on your social posts.

Yet most people don't do this!



# How to Share Your Video: Blog

- You can upload or paste an embed code!



[Home](#) [About](#) [Resource Center](#) [Tools](#) [Events](#) [Contact](#)

## DID YOU KNOW - VIDEO EXAMPLE!

February 26, 2025



# How to Share Your Video: Youtube

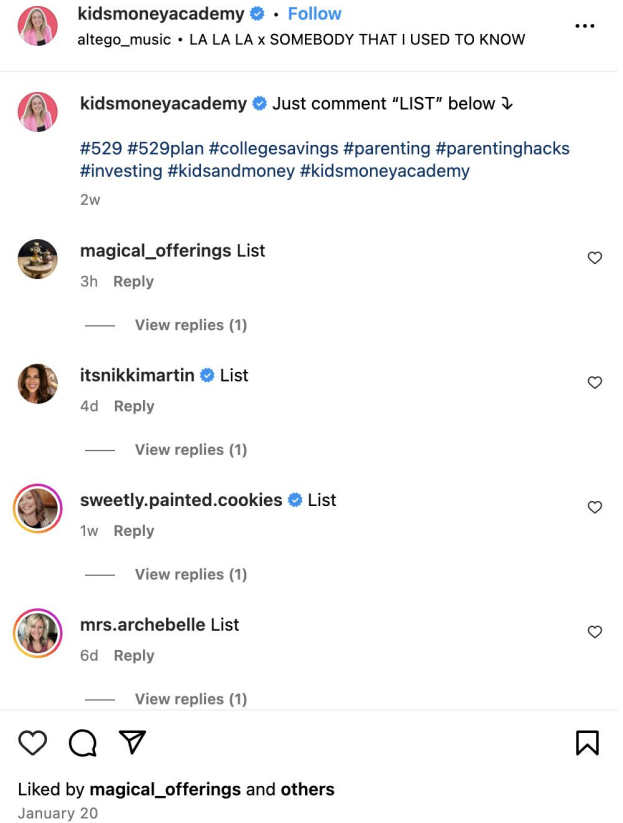
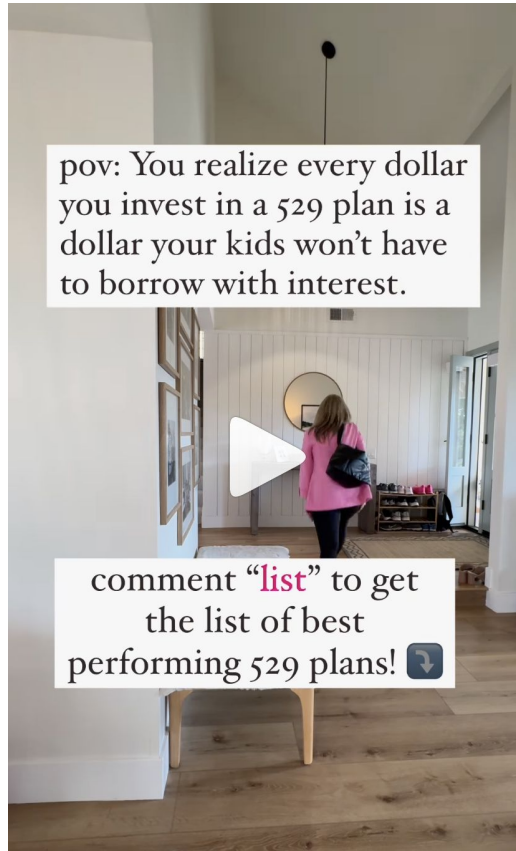
- Use TubeBuddy to help you get great SEO on your videos
- **Horizontal** for regular Youtube, **Vertical** for Youtube Shorts! for Social!

The screenshot displays the YouTube homepage interface. At the top, there is a search bar and navigation icons for 'Create', a notification bell, and a profile icon. Below the search bar are navigation tabs for 'Home', 'Videos', 'Shorts', 'Live', 'Playlists', and 'Community'. The main content area is divided into two sections: 'Popular videos' and 'Shorts'. The 'Popular videos' section features four video thumbnails with titles such as 'How Do the Affluent Find a New Financial Advisor?', 'Marketing for Financial Advisors in 6 Easy Steps', '7 Social Media Post Ideas Proven to Work for Financial Advisors', and 'How Your Lackluster Website is Hinder Your Firm's AUM'. The 'Shorts' section shows four vertical video thumbnails, including 'LinkedIn Insider Tip', 'Be Ready When the', 'Flash Kinsid', and 'Client Event Ide'. A sidebar on the left contains navigation options like 'Home', 'Shorts', 'Subscriptions', 'History', 'Playlists', 'Your videos', 'Watch later', 'Liked videos', 'Subscriptions', and 'More'.

# How to Share Your Video: Instagram

- Use **REELS** to grow your audience

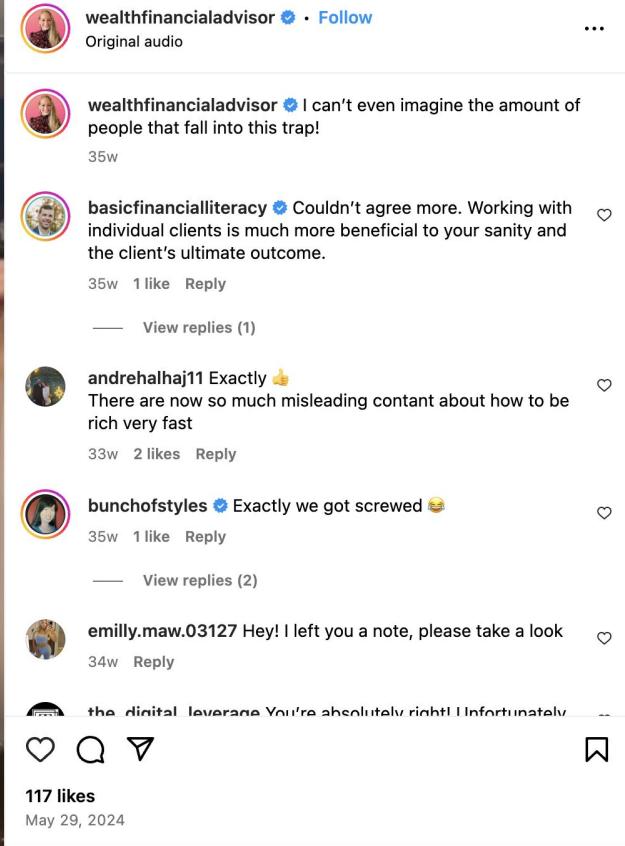
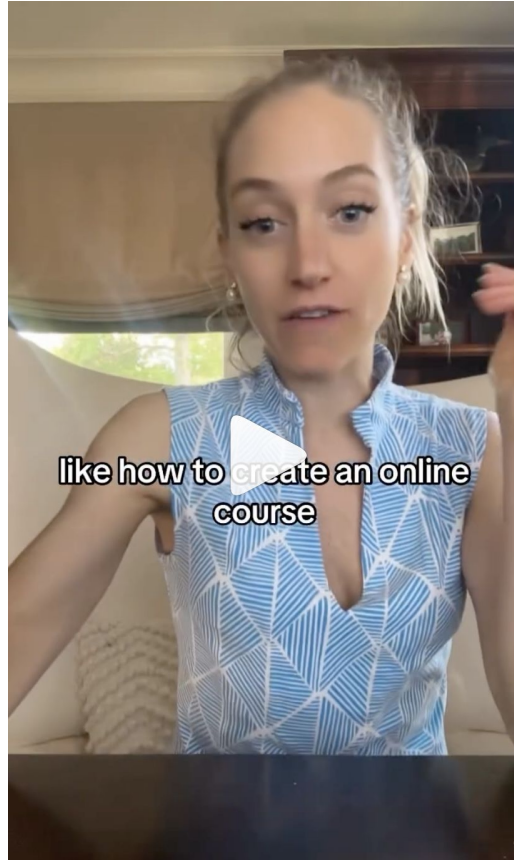
Use **STORIES** to connect with the followers you already have



# How to Share Your Video: Instagram

Use a mixture of B-Roll and “Talking Head” videos

People want to see the PERSON behind the Business!



Source: <https://www.instagram.com/wealthfinancialadvisor/>

# Recommended Content: March

# 10-Minute Marketing Calendar

**Suggested content and direct links to easily find and use recommended content**

Includes content recommendations for:

- Email marketing
- Automation marketing
- Social posts
- Downloadables
- And new Canva templates

Look out for the monthly email coming from [service@fmgsuite.com](mailto:service@fmgsuite.com) - sends the last week of every month!

### 10-Minute Marketing Calendar

#### March 2025

March brings opportunities to spotlight inspiring milestones and support timely planning. Celebrate Women's History Month and International Women's Day while helping your clients prepare for the end of Medicare General Enrollment and last-minute tax deadlines.

Review the content below to decide which pieces you'd like to use.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
23	24	25	26	27	28	1
2	3 Weekly Market Insights	4 Celebrating Women W...	5 Consider Keeping Your ...	6 Bridging the Confidenc...	7 Daylight Savings Time	8 International Women's ...
9	10 Weekly Market Insights	11 2025 Annual Tax Guide	12 The Long Run: Women ...	13 "Lost" Retirement Acco...	14 How to Conquer the Wo...	15
16 St. Patrick's Day	17 Weekly Market Insights	18 Video of the Month	19 Spring Personal Financ...	20 Budgeting After Divorce	21 Spring Cleaning? It's No...	22
23	24 Weekly Market Insights	25 Retirement for Women	26 Essential Financial Figu...	27 Chart of the Month	28 Medicare General Enrol...	29
30 Weekly Market Insights	31	1	2	3	4	5

# Content Planning

## Holidays/Observances

### March

- St. Patrick's Day (3/16)  
(Social, Card & Email)
- Daylight Savings Time Begins  
(3/7) (Email, Card & Social)
- International Women's Day  
(3/8) (Email & Social)

### Greeting Card



### Email



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### Social Post



fmg

# Content Planning

## March is the month of:

- Tax Prep (Social & Downloadable)
- Women's History Month (Card, Email Sequence, Social post and Sequence)

## Infographic



## Email

As you may know, March is Women's History Month and a chance for us all to celebrate the trailblazing women who have contributed to our history, culture, and society. Interestingly, the month-long celebration grew out of an event organized by the school district of Sonoma, CA, in 1978. A few years later, their concept sparked similar events across the country, and in 1980 Jimmy Carter declared the week of March 8 as National Women's History Week, which eventually grew to be Women's History Month.

Each week this month, we'll be honoring a different woman who has shattered the glass ceiling and helped pave the way for future generations. To start, we wanted to spotlight Katherine Graham. You may know that Graham was the publisher of The Washington Post. But did you know she was also the first female CEO of a Fortune 500 company?

Taking over The Post in 1961 and dominated by men, she published the Pentagon Papers and the Watergate scandal. Her controversial decision to publish the Pentagon Papers hastened the end of the Vietnam War. Her newspaper and an illness for that, she has my of

## Downloadable

2025 TAX GUIDE

How to Prepare for Tax Season

Remember to get your tax forms, receipts, and accounting professionals before making any changes.

The guide will explore how tax filing may look different this tax year and what you can do to prepare. Remember to get your tax forms, receipts, and accounting professionals before making any changes.

2024 Tax Rate	Single	Married Filing jointly
10%	\$0 to \$11,950	\$0 to \$23,900
12%	\$11,951 to \$47,150	\$23,901 to \$94,300
22%	\$47,151 to \$103,050	\$94,301 to \$206,100
24%	\$103,051 to \$178,150	\$206,101 to \$356,300
28%	\$178,151 to \$328,100	\$356,301 to \$656,200
33%	\$328,101 to \$501,000	\$656,201 to \$1,002,000
37%	\$501,001+	\$1,002,001+

## Greeting Card



## Social



**Social Profile Name**  
@socialhandle

The IRS announced adjustments for 2025, which address a few key areas:  
<https://www.irs.gov/newsroom/irs-releases-tax-inflation-adjustments-for-tax-year-2025>.

What does that mean for you?

There are changes to capital gains tax rates, annual exclusion for gifts, estate tax exclusion, and more

**Social Profile Name**  
@socialhandle

Have questions about the new rules? resources that you may find helpful.

This material is for informational purposes only. It is not a replacement for real-life advice, so professional before modifying your



Happy Women's History Month! As we celebrate this special month, let's take a moment to reflect on the immense contributions women have made to the world of finance, business, and beyond.

Pioneering Women in Finance: Women like Abigail Adams, who, back in the 18th century, wisely invested in government bonds, and Hetty Green, known as the "Witch of Wall Street," who became one of the richest women in the world in the late 19th century. They paved the way for future generations of women in finance.

Present Day Leaders: Today, we have extraordinary women leading financial institutions, government bodies, and startups, demonstrating that finance is no longer a "men's club." Women like Janet Yellen, the first woman to chair the Federal Reserve and now the U.S. Treasury Secretary, and Mary Barra, the CEO of General Motors, are leading the way.

Empowering the Next Generation: As we forge ahead, let's continue to break barriers, shatter glass ceilings, and pave the way for the next generation of women in finance.

This month, we salute the women who've bravely charted their own path in finance and have inspired countless others to do the same.

Remember, every investment we make today can build a stronger financial future for all women tomorrow.

#WomensHistoryMonth #WomenInFinance #Empowerment #FuturesFemale



# Product Updates

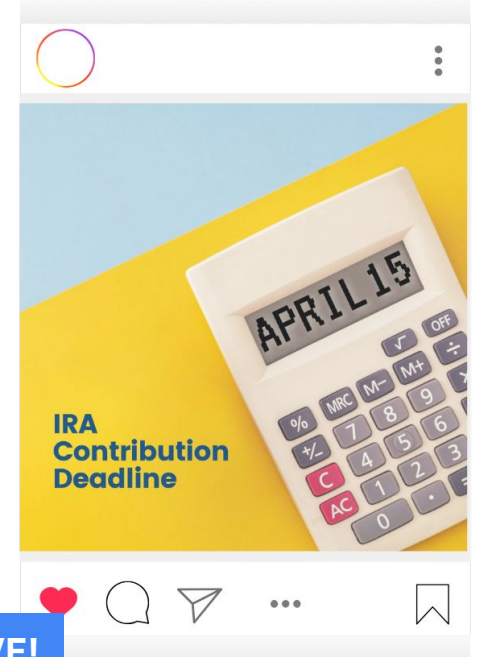
# Instagram Integration

## Manage Everything in One Place!

FMG Marketing Suite Premium users can now seamlessly connect Instagram, bringing all your social media management into one dashboard.

Easily share content from FMG directly to your Instagram Business or Creator account.

**Please note: This update is only available for customers who's Broker Dealer approved Instagram.**



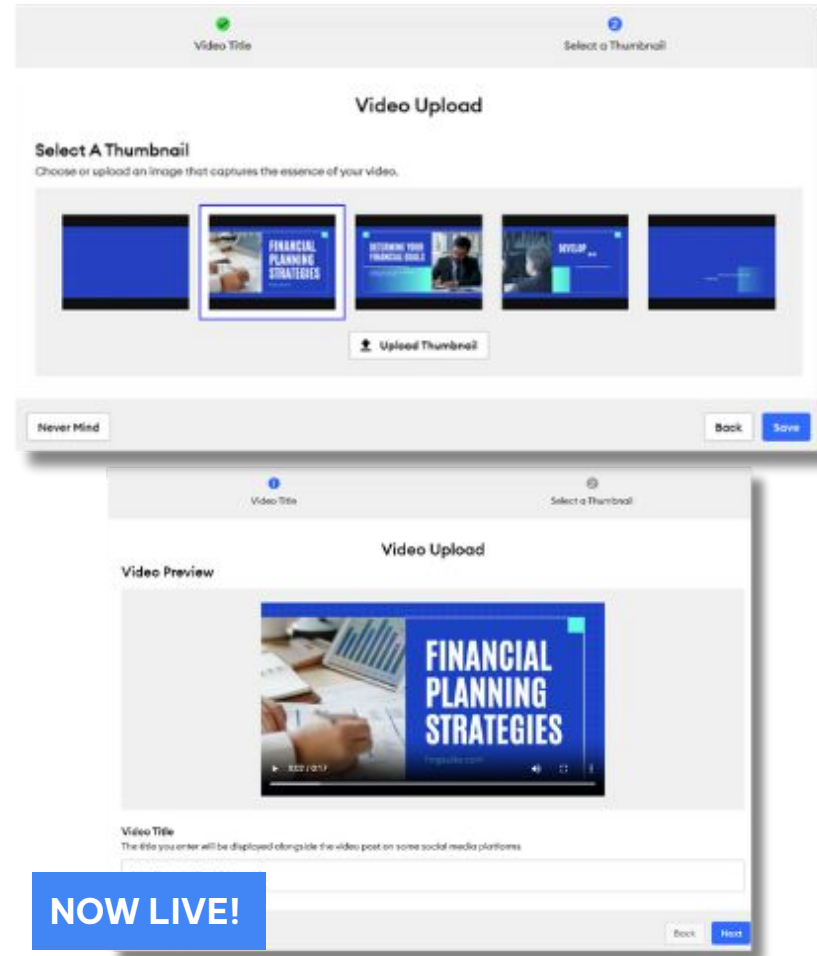
**NOW LIVE!**

# Social Video Integration

## Maximize Engagement with Video!

Effortlessly upload and share videos across Facebook, Instagram (if approved), and LinkedIn using FMG's latest video feature.

Take advantage of video's high engagement potential with your audience.

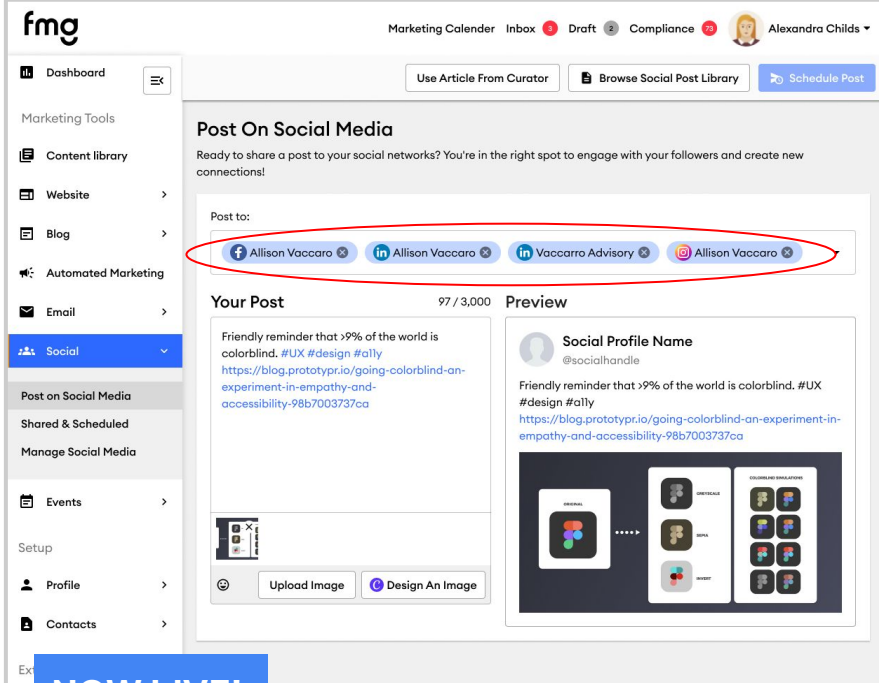


# Profile Specific Social Posts

## More Control of Your Social Media Strategy!

Now you can select which social profiles to post to—right from your FMG admin!

Customize your content for specific audiences and broaden your impact.



The screenshot displays the FMG admin interface for creating a social media post. The left sidebar shows navigation options like Dashboard, Marketing Tools, Content library, Website, Blog, Automated Marketing, and Email. The 'Social' section is expanded, showing options for 'Post on Social Media', 'Shared & Scheduled', and 'Manage Social Media'. The main content area is titled 'Post On Social Media' and includes a 'Post to:' section with four social media profiles selected: Allison Vaccaro (Facebook), Allison Vaccaro (LinkedIn), Vaccarro Advisory (LinkedIn), and Allison Vaccaro (Instagram). Below this, the 'Your Post' section shows the content being prepared, and the 'Preview' section shows how it will appear on a social profile. A blue banner at the bottom of the screenshot reads 'NOW LIVE!'.

fmg

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# Today's Giveaways 🎉



VIDEO PACKAGES ▾

BLOG

MEET THE TEAM

SPEAKING

WATCH THE DEMO

SCHEDULE A CALL

# GET ROI WITH VIDEO

Built for Financial Advisors Like You



## CREATE • ENGAGE • CONVERT

1

### FIND YOUR STORY

- Professional help identifying the best topics
- Custom content plan built for you
- Script written for you capturing your voice

2

### CAPTURE YOUR VIDEO

- Tried & tested gear delivered
- Live performance coaching
- Shoot three stories at a time
- Film from your home or office
- Convenient & flexible schedule

3

### EXPERT EDITING

- Professionally edited with your branding
- Custom graphics & engaging visuals
- Licensed music track
- Custom captions for silent play
- Two rounds of re-edits

# Content Giveaway

## EXCLUSIVELY FOR REGISTRANTS

- **YouTube Guide**  
*(Idea Decanter)*
- **Video Checklist**  
*(FMG)*

## IDEA DECANter'S GUIDE TO YouTube

Your YouTube page needs to match the brand you've built. That means customizing it. Where do you start?



### STEP #1

From the picture and banner image, to watermarks and branding, all will make your page look professional. Plus, you'll increase your char prospects to clients with your



### STEP #2

What's the first thing people see on your YouTube page? The header image. Adjust the YouTube template or our template for [Canva](#) here.



### STEP #3

You're ready to start publishing. Here's how to:

- Disable comments
- Upload a custom thumbnail
- Start a playlist



### STEP #4

Are you ready for an easy but important settings are locked video, you'll save yourself time

WANT TO USE VIDEO TO GROW

fmg

## Video Checklist

Keep this checklist handy to **create professional-quality videos** without complicated equipment or a huge budget.

### Camera

- Smartphone or Webcam
  - Optional: tripod for stable recording

### Location

- Quiet, minimal background distractions, natural light source (near a window)
  - If you don't have a natural light source, purchase a ring light instead
- Professional, clean background (but don't skip on any personal touches – people love seeing art pieces, autographed jerseys or family photos in the background)

### Content

- Outline development
  - Speak from an outline versus a word-for-word script to sound natural
- Identify any graphics/pop-ups to include
- Not sure where to start? Base your video content on existing blogs, articles, or market commentaries for inspiration and structure
- Always start with an eye-catching hook

### Hook examples:

- “ I've helped 100 people retire. Here's what most of them said they wish they'd done before retirement
  - Before you apply for Social Security, watch this
  - Scared about being bored in retirement? Try this
  - If you have RSUs, avoid a huge surprise tax bill with this tax planning strategy
  - If you have a net worth over \$2 million, here's what you need to know before you retire
  - What NOT to do when claiming Social Security
  - If you are under 45 and making \$150K or more a year, you need to know this
  - Struggling with high tax bills? Watch this
  - Business owner with less than 50 employees? You need to know this about getting health insurance for staff
  - The absolute WORST advice about saving money for retirement
- ”

# Session Giveaway

Secure your FREE 'Set Your Shot' video consultation with Idea Decanter, experts in custom videos for financial advisors.

**12 spots are available—book now before they're gone!**

fmg

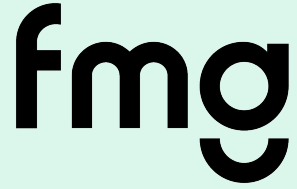
# SET YOUR SHOT



WITH IDEA DECANter CO-  
FOUNDER & CREATIVE  
DIRECTOR SHARON GOTTULA

)(  
(i<sup>idea</sup>)  
DECANter





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# Looking to Elevate Your Marketing for an Impactful 2025?

## Marketing Tip

[Shred Day Event](#)

## Podcast Script of the Month

[10 Things You Can Do to Help Simplify Your Estate for Your Heirs](#)

## Video Script of the Month

[Best Gift You Can Give Your Family](#)



**Susan Theder**

CMO/CXO, FMG

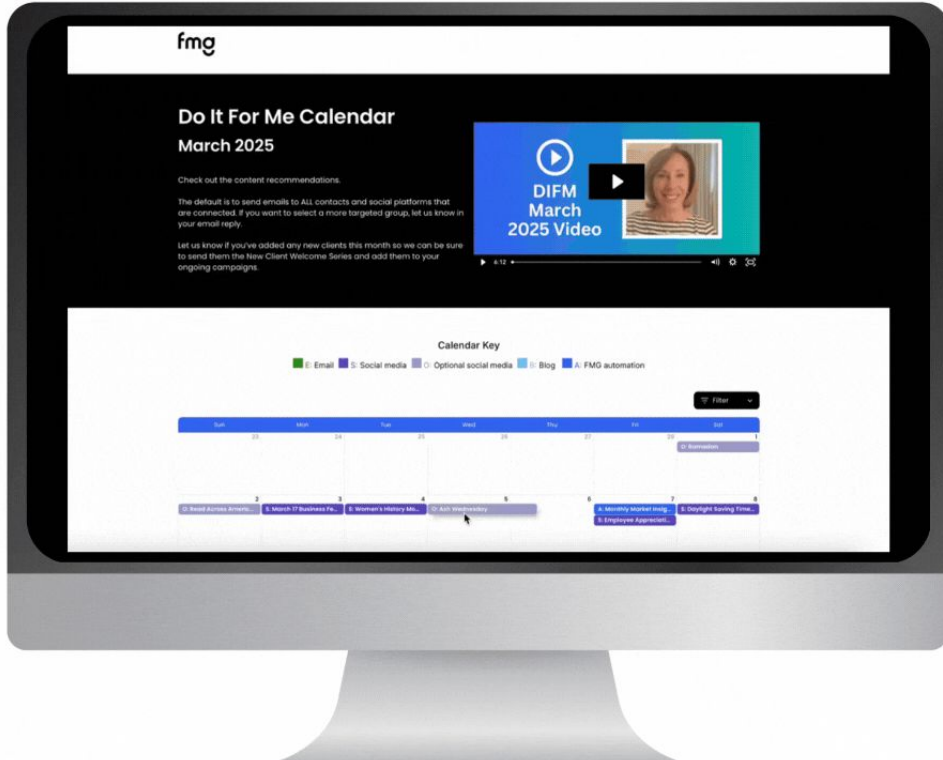


**Samantha Russell**

Chief Evangelist, FMG

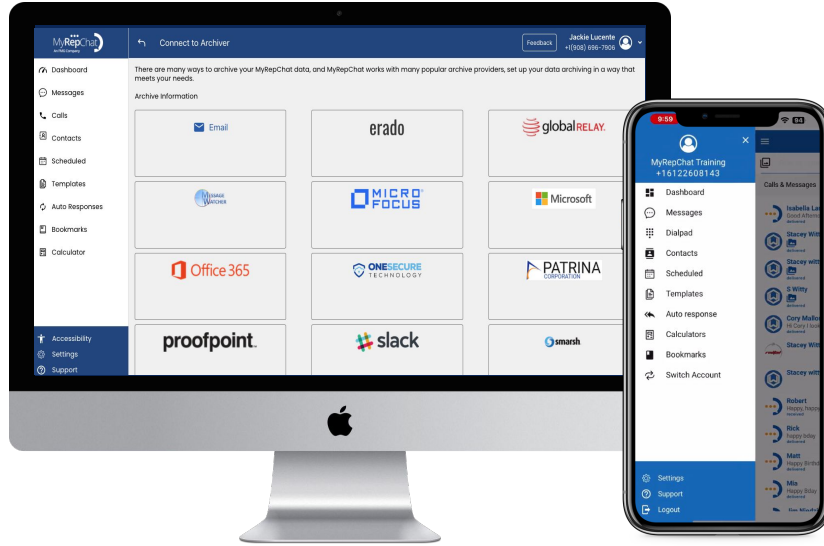
# 'Do It For Me'

## MARKETING



- Monthly **content marketing** plan with customization tips
- Your own dedicated **Marketing Concierge**
- Increase **client** engagement, **drip on prospects and COIs**
- Take the **heavy lifting off** your plate
- **5-star content exclusively written** by Sam & Susan

# 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

# FMG's Referral Program

Share the power of our marketing tools with your fellow financial advisors AND get rewarded!

## How to participate:

1. **Spread the word:** Share the benefits of FMG's powerful marketing solution with your colleagues and connections.
2. **Submit a referral:** Use our referral form to provide your referral's name and email. We'll take it from there!
3. **Earn rewards:** When your referral becomes a new FMG customer, you'll both receive a \$100 credit added to your account.



# Save the date for our next webinar!

## Did You Know?

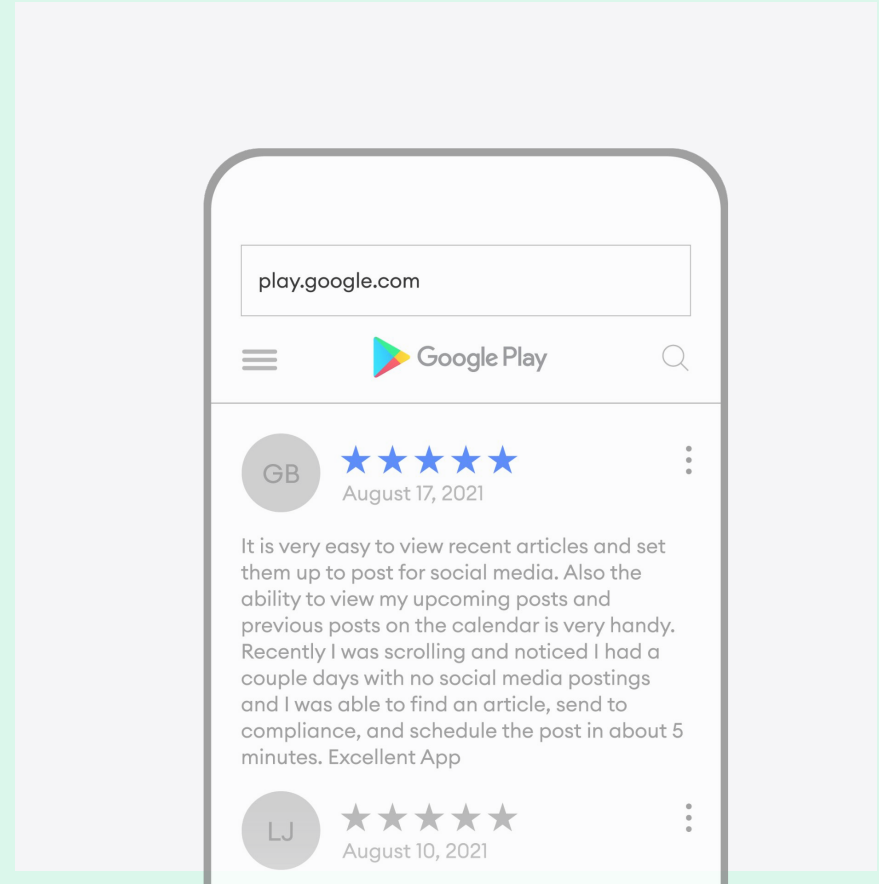
**Wednesday, March 26th -  
11 am PT / 2 pm ET**



# Download the FMG App!



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