



Did You Know

Social Media: Posting Strategies to Accelerate Growth



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Elise Lambert



fmgsuite.com



Reminder: February workshop

Communicate with Video

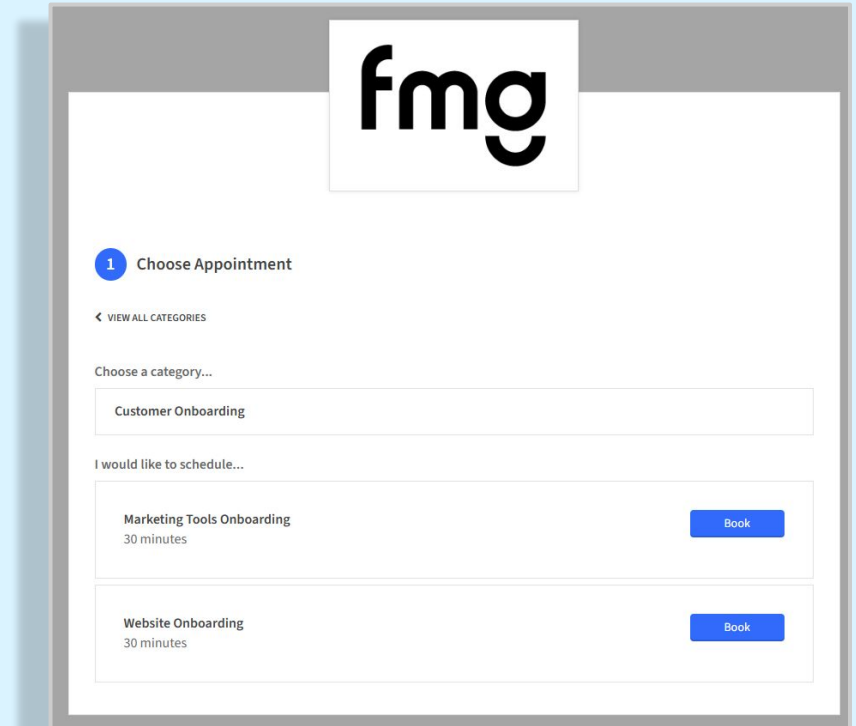
- Video marketing strategies
- Your Video Marketing Toolkit
- How to leverage your FMG tools to repurpose video across multiple platforms.

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

Optimize your social media
with Answer Engine
Optimization (AEO)

Transform your LinkedIn with
events and invites

Utilize AI and repurpose content
to effortlessly fill your calendar

Enhance your posts with
captivating visuals via Canva



SEO vs AEO

(Search Engine Optimization)

(Answer Engine Optimization)



How searches use to work...



Consumer Financial Protection Bureau (.gov)
<https://www.consumerfinance.gov/before-you-claim>

Planning your Social Security claiming age

Planning your **Social Security claiming age** · Step 1: Explore how the age you **start** collecting **Social Security** affects your retirement benefits · Step 2: Learn ...



Social Security Administration (.gov)
<https://www.ssa.gov/pubs> PDF

Your Retirement Checklist

Base your decision about when to **apply** for benefits on your individual and family circumstances. We hope the following information will help you understand how ...
4 pages



AARP
<https://www.aarp.org/claim-benefits-early-or-late>

3 Reasons You May Want to Claim Social Security Early

Oct 19, 2023 — Use AARP's **Social Security** Calculator to find out when to **apply** and how much you'll get. Still, deciding when to **start Social Security** doesn't ...

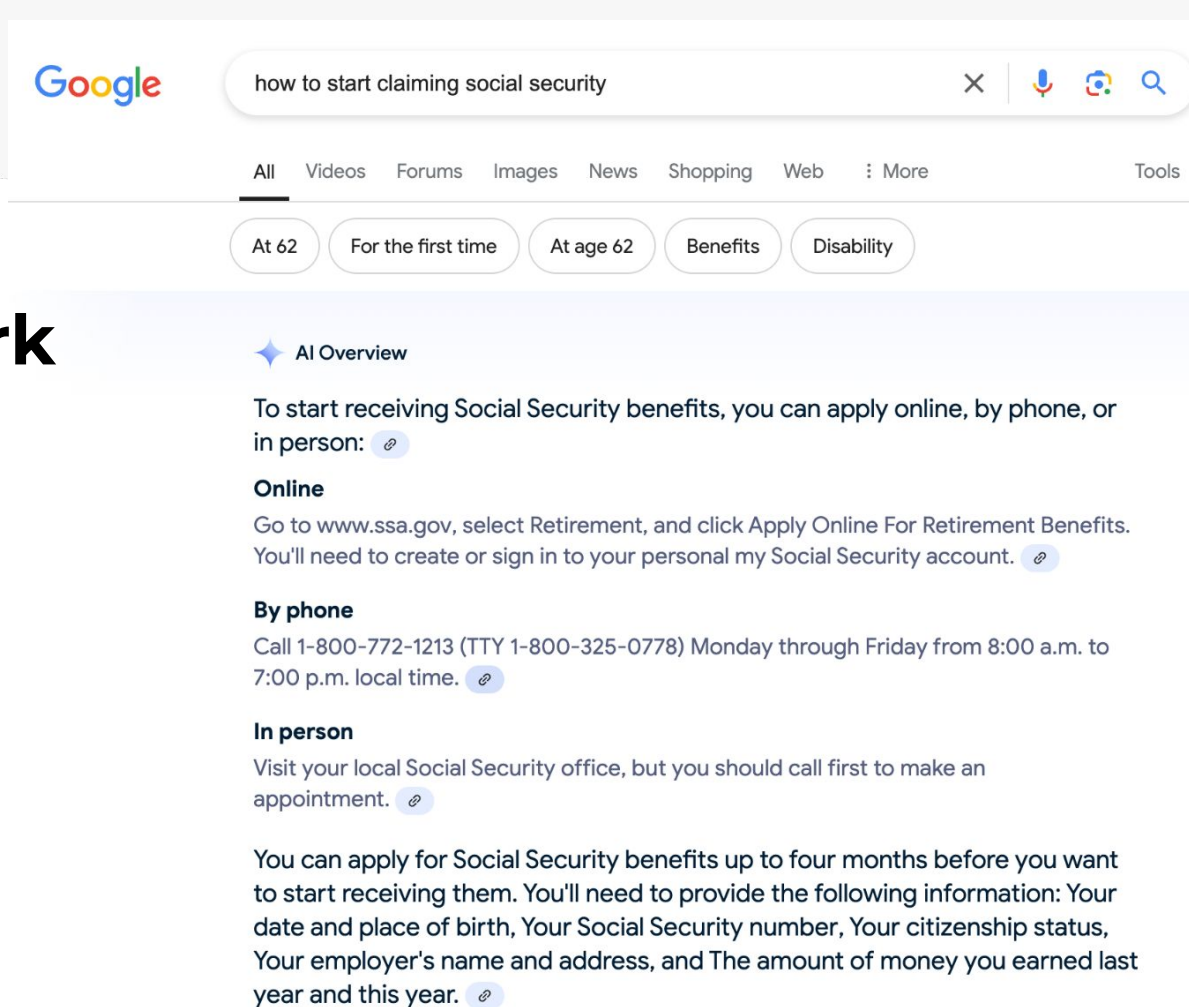


Merrill Lynch
<https://www.ml.com/articles/social-security-aiming-fo...>

Determining The Best Age to Collect Social Security (for You)

One of the first big decisions we're faced with as we approach retirement is when to **claim** our benefits — and timing is important. While you can **start** as early ...

How they work today...



Google

how to start claiming social security

All Videos Forums Images News Shopping Web : More Tools

At 62 For the first time At age 62 Benefits Disability

◆ AI Overview

To start receiving Social Security benefits, you can apply online, by phone, or in person: ⓘ

Online

Go to www.ssa.gov, select Retirement, and click Apply Online For Retirement Benefits. You'll need to create or sign in to your personal my Social Security account. ⓘ

By phone

Call 1-800-772-1213 (TTY 1-800-325-0778) Monday through Friday from 8:00 a.m. to 7:00 p.m. local time. ⓘ

In person

Visit your local Social Security office, but you should call first to make an appointment. ⓘ

You can apply for Social Security benefits up to four months before you want to start receiving them. You'll need to provide the following information: Your date and place of birth, Your Social Security number, Your citizenship status, Your employer's name and address, and The amount of money you earned last year and this year. ⓘ

Google Now sourcing Featured Snippets



what is the best way to ensure you have regular income in retirement



◆ AI Overview

Learn more ⋮

To ensure regular income in retirement, the best strategy is to diversify your income sources by combining predictable options like Social Security benefits, employer pensions (if available), and annuities with well-managed investments in retirement accounts (like 401(k)s and IRAs), while also considering a withdrawal strategy that prioritizes consistent cash flow over market volatility; consulting a financial advisor can help tailor a plan based on your specific circumstances. ⓘ

Key elements of a secure retirement income plan:

Maximize Social Security benefits:

Understand how to optimize your claiming age to maximize your monthly Social Security payments. ⓘ

Contribute to employer-sponsored retirement plans:

Take full advantage of your company's 401(k) or pension plan, especially if they offer employer matching contributions. ⓘ

Consider annuities:

Annuities can provide a guaranteed income stream for life, which can be beneficial for covering essential expenses. ⓘ

Diversify investments:

Spread your retirement savings across different asset classes like stocks, bonds, and real estate investment trusts (REITs) to manage risk. ⓘ

Develop a withdrawal strategy:

Create a plan for how much to withdraw from your retirement accounts each year to ensure your money lasts throughout retirement. ⓘ

Part-time work or passive income:

Investment Options to Generate Income in Retirement - U.S. Bank

How do I create income in retirement? There are a variety of ways this can occur. Among the strategies to consider are:...

● U.S. Bank ⋮

How to plan for your income needs in the 3 stages of retirement

Make sure you have a retirement income plan Once you stop receiving a regular paycheck, you will move from accumulatin...

🏦 Merrill Lynch ⋮

Top Retirement Investments for Guaranteed Regular Income

May 12, 2024 — A REIT (Real Estate Investment Trust) mutual fund aggregates real estate holdings (apartment buildings,...

🔗 Sensible Money ⋮

Show all

How Results for “Best advisor near me” used to look...



best financial advisor near me



ameripriseadvisors.com

<https://www.ameripriseadvisors.com>

Ameriprise Financial: Find a financial advisor near me

Use the search function above to find a financial advisor near you. Enter your location. Use your ZIP or City, State. Some advisors may also be available for ...



Barron's

<https://www.barrons.com> > advisor > report > top-finan...

2024 Top 1200 U. S. Financial Advisors Ranked by State

Here are America's best financial advisors, organized by state. The rankings are based on data provided by around 6,000 of the nation's most productive advisors ...



Northwestern Mutual

<https://www.northwesternmutual.com> > find-a-financial...

Find A Financial Advisor or Representative

Looking for someone specific? Search for a financial advisor or professional you're already working with, or find one by name.



NerdWallet

<https://www.nerdwallet.com> > best > investing > financial...

Top Financial Advisors: Best Firms for 2025

Dec 18, 2024 — The best financial advisors include Zoe Financial, Vanguard Personal Advisor, Facet, Harness Wealth, Empower and Schwab Intelligent ...

who are are the best financial advisors in pittsburgh, pa

How they look today on ChatGPT...

Pittsburgh, Pennsylvania, boasts a diverse array of financial advisory firms catering to various financial needs. Here are some notable financial advisors in the Pittsburgh area:

[Legend Financial Advisors, Inc.](#)

Pittsburgh, PA

Established in 1993, this firm offers comprehensive wealth management services, including financial planning, investment management, IRA rollovers, and 401(k) management. They focus on creating personalized financial plans based on clients' expenses and risk tolerance. [EXPERTISE.COM](#)

[JFS Wealth Advisors](#)

Pittsburgh, PA

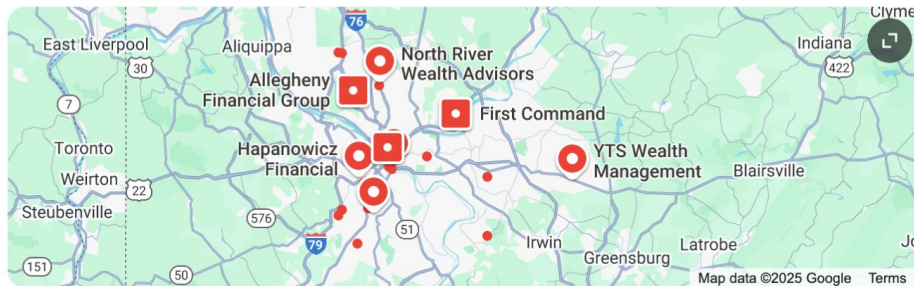
Founded in 1986, JFS provides integrated investment strategies and financial solutions to individuals, businesses, and families. Their services encompass retirement planning, estate planning, and investment management. [EXPERTISE.COM](#)

[Fragasso Financial Advisors](#)

Pittsburgh, PA

Recognized by Forbes and Barron's, Fragasso offers a range of services, including income tax reduction strategies, life insurance, long-term capital analysis, estate planning, and business

Businesses :



Carson Wealth

4.9 ★★★★★ (58) · Financial planner

15+ years in business · 1 Bigelow Sq 20th floor

Open · Closes 5 PM · (412) 904-2017

🗣️ "The level of care and attention to detail they offer is unmatched."



Website



Directions

North River Wealth Advisors

5.0 ★★★★★ (25) · Financial planner

5800 Corporate Dr Suite 300

Open · Closes 5 PM · (412) 783-1781

🗣️ "Their attention to your personal, **financial** needs are exemplary."



Website



Directions

YTS Wealth Management

5.0 ★★★★★ (64) · Financial planner

5+ years in business · Export, PA

Open · Closes 4:30 PM · (724) 733-4334

🗣️ "Her knowledge and attention to each client is second to none."



Website



Directions

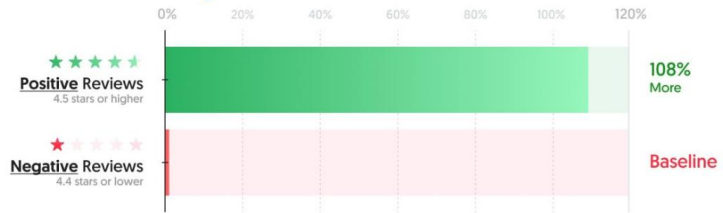
How they look Today on Google...

What do all of these have in common?

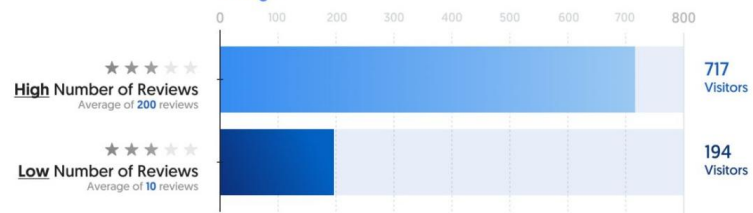
What factors impact getting shown by Google or ChatGPT to users?

How Reviews Impacts Traffic

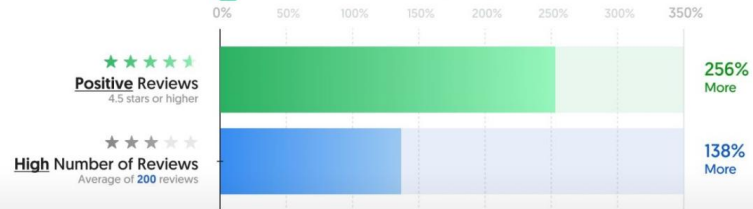
Google | Organic Traffic From Google (Percentage)



Google | Organic Traffic From Google (Monthly Sessions)






ChatGPT | ChatGPT Recommendations (Percentage)





WHAT TO DO NEXT: Focus on getting high quality reviews in **quantity**. It helps you get more traffic and recommended more by AI platforms.

Key strategies to get ChatGPT to recommend your business:

High-Quality Content:

- Publish informative blog posts, articles, and videos that directly address common questions and concerns related to your industry. 
- Use relevant keywords throughout your content to improve discoverability. 
- Ensure your content is well-structured, easy to read, and provides valuable information. 

Positive Online Reputation:

- Encourage customers to leave positive reviews on your website, Google My Business, and other review platforms. 
- Actively manage your online reputation by addressing any negative feedback promptly. 



Social Media Presence:

- Regularly post engaging content on relevant social media platforms. 
- Participate in industry conversations and discussions. 

Industry Expertise:

- Establish yourself as an expert in your field by publishing thought leadership content and participating in industry events. 

Content Outreach:

- Collaborate with other businesses or influencers in your industry to reach a wider audience. 
- Submit guest posts on relevant websites. 

Important points to remember:

Relevance to User Queries:

ChatGPT will prioritize businesses that directly answer the user's questions and provide relevant information. 

Conversational Tone:

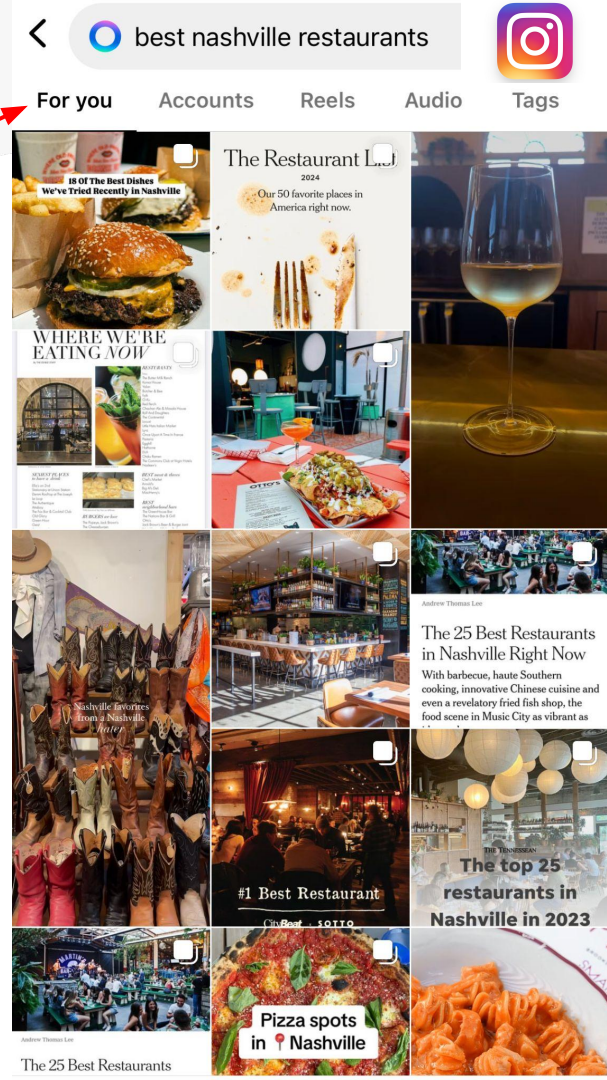
When creating content, consider how you would naturally answer questions related to your business in a conversation. 

Consistency is Key:

Regularly update your website and social media with fresh content to maintain visibility. 

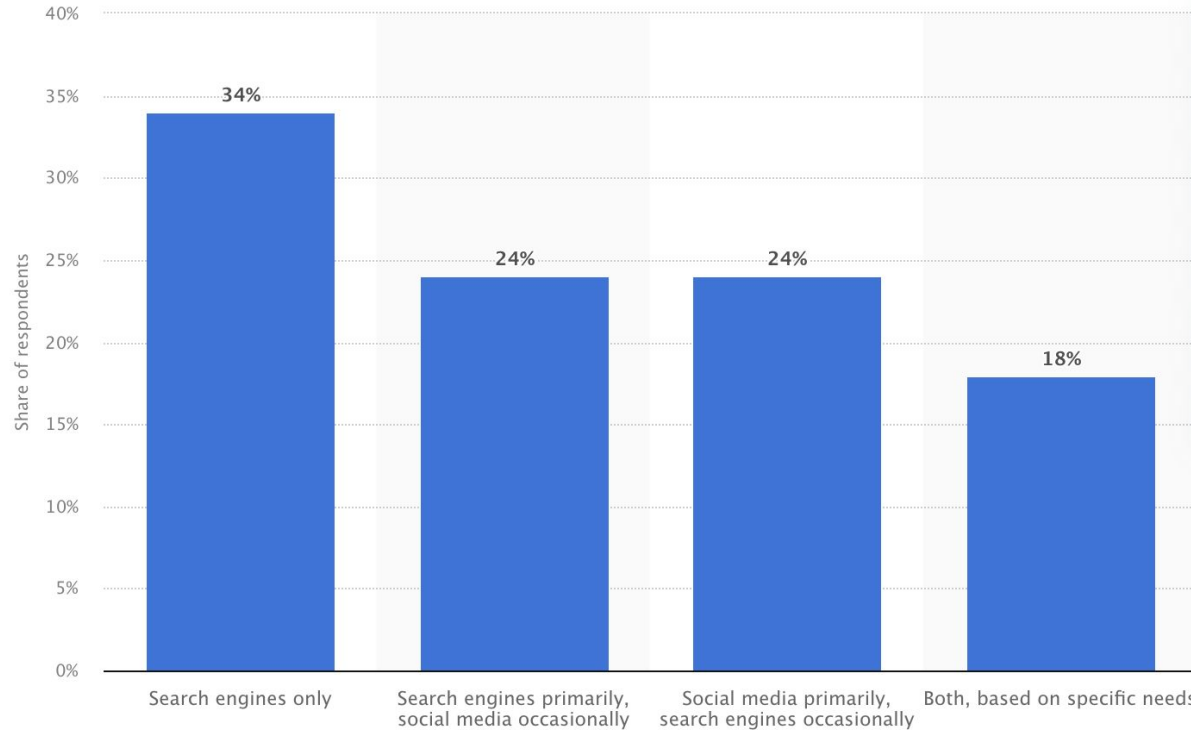
Optimizing Social Media Posts for AEO

A New Era: Social Search



US adults Search Engine & Social Search Preferences

Source: Statista, April 2024



Social Search:
not just for young
people on Instagram
anymore

The screenshot shows the LinkedIn search interface. At the top, the search bar contains the text "capital gains tax implications". Below the search bar, navigation tabs include "Posts", "Jobs", "People", "Companies", "Groups", "Schools", "Courses", "Events", "Products", and "Services". The "Posts" tab is selected. On the left side, there is a sidebar titled "On this page" with options for "Posts", "Jobs", "People", and "More posts". The main content area displays a post by "Grant E. Allen, MSA, IRS Enrolled Agent". The post title is "Smart Investment Tax Strategies That Could Save You Thousands". Below the title is a video thumbnail with the text "CRAFTING A WINNING BUSINESS STRATEGY" and "This Is Your Investment Tax Strategy Guide". The video description reads "Investment Tax Strategy Guide: Maximizing Returns Through Capital Gains vs. Ordinary Income Planning". The post has 5 likes.

Optimizing Social Media Posts for AEO



Understand User Intent

Research common financial questions like 'How to save for retirement?' or 'What is a 401(k)?'. Use these insights to create content that addresses these questions directly.



Use Clear and Direct Language

Post a straightforward explanation like, 'A 401(k) is a retirement savings plan offered by employers that lets employees save and invest a portion of their paycheck before taxes are taken out.'



Incorporate Relevant Keywords

Use keywords such as 'retirement planning,' 'investment strategies,' or 'financial security' in your posts. For instance, 'Top investment strategies for retirement planning.'

Optimizing Social Media Posts for AEO



Structured Data for Social Media Content

Use clear headings and bullet points to improve readability and engagement on social media platforms.



Infographics and Videos for High-Quality Content

Create visually appealing infographics and informative videos to educate your audience on financial topics.



Prompt Responses and Audience Engagement

Quickly respond to follower questions with detailed answers, and encourage further discussion to maintain engagement.

Key AEO Strategies

1. Format in a Question- Answer style
2. Target question-based queries (e.g., 'People Also Ask')
3. Include FAQ page(s) on your website
4. Optimize for featured snippets (bulleted lists, short answers)
5. Write in a conversational style for AI search tools
6. Place short, clear answers at the top of content
7. Importance of Local Listings & Claiming/Optimizing Google My Business

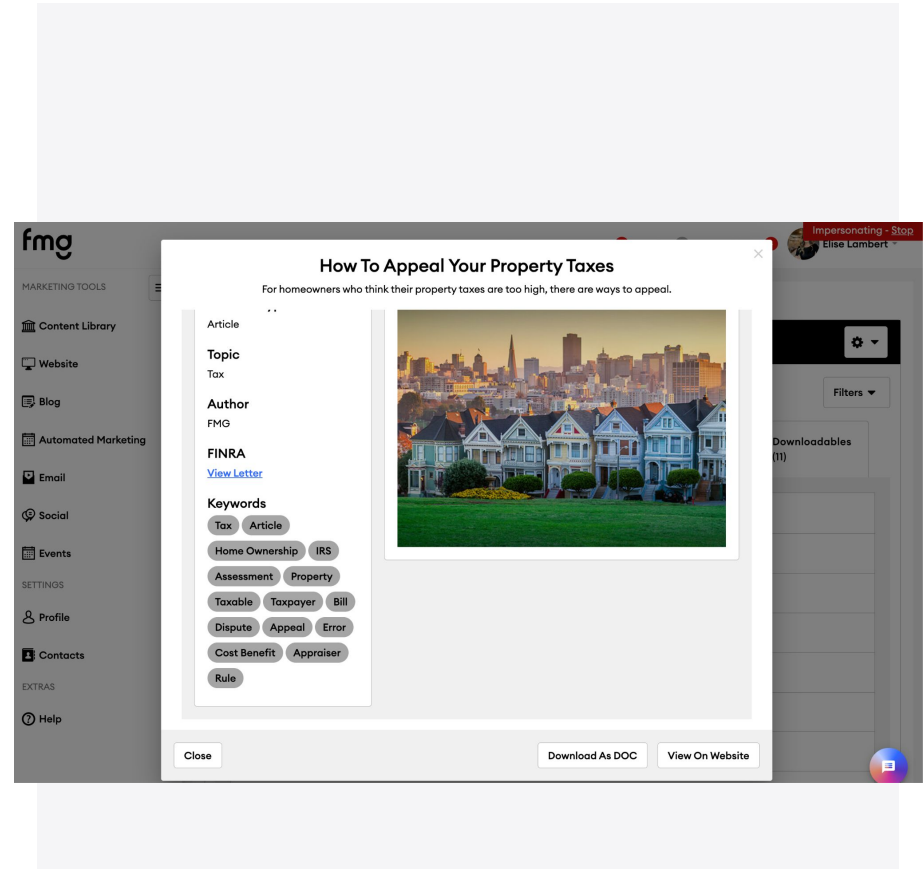
Utilize AI & Repurpose Content

Repurposing FMG Content

AI Prompt

Prompt: Turn this article into three separate social posts written for Answer Engine optimization; make sure they are written in a long format with bullet points and can use some emojis. Also, add a question to encourage followers to interact with the post. Target audience: Millennials

<https://www.fmgwebsites.com/2e20f339-000d-4a1c-a888-5d658f8b8c3d/resource-center/tax/how-to-appeal-your-property-taxes>



The screenshot displays the FMG website interface. On the left is a sidebar menu with categories: MARKETING TOOLS (Content Library, Website, Blog, Automated Marketing, Email, Social, Events), SETTINGS (Profile, Contacts), EXTRAS, and Help. The main content area features an article titled "How To Appeal Your Property Taxes" with a sub-headline "For homeowners who think their property taxes are too high, there are ways to appeal." Below the title is a photograph of a row of colorful houses in San Francisco. A sidebar on the right lists metadata: Article, Topic (Tax), Author (FMG), and FINRA (with a "View Letter" link). A "Keywords" section contains a grid of tags: Tax, Article, Home Ownership, IRS, Assessment, Property, Taxable, Taxpayer, Bill, Dispute, Appeal, Error, Cost Benefit, Appraiser, and Rule. At the bottom of the article preview are buttons for "Close", "Download As DOC", and "View On Website".

Example



Post 1: Understanding Property Tax Appeals for Millennials 🏠💰



Hey Millennials! Did you know you can appeal your property taxes if you believe they're too high? Here's a quick guide to help you understand the process:

- **Research Your Property's Assessment:**
 - Start by reviewing your property tax assessment notice.
 - Compare your property's assessed value with similar properties in your area.
- **Gather Supporting Evidence:**
 - Collect recent sales data of comparable properties.
 - Document any discrepancies in your property description or condition.
- **File Your Appeal:**
 - Check your local government's deadline for filing an appeal.
 - Submit your appeal form along with all supporting documents.
- **Prepare for the Hearing:**
 - Be ready to present your case and evidence at the hearing.
 - Practice explaining why your property's assessment should be lower.

Remember, appealing your property taxes can lead to significant savings. 💰 Have you ever considered appealing your property taxes? What steps did you take to ensure success? Share your experiences or questions below! #PropertyTaxAppeal #MillennialMoney #AEO

Content Repurposing Strategies



Blog to Social Media

- Summarize blog post into 3 engaging social media posts, highlighting key takeaways for investors.
- Create a LinkedIn post series that breaks down the main points in a simple, engaging way.



Webinar to Blog

- Convert key points from webinar into a detailed blog post with actionable insights for financial planning.
- Draft a blog post that summarizes the discussion from the webinar, including quotes and examples.



Podcast to Newsletter

- Turn podcast episode into a newsletter article, focusing on the main financial strategies discussed.
- Extract key insights from the podcast and format them into a newsletter with bullet points for easy reading.



Client FAQs to Video Script

- Transform frequently asked questions into a script for a short, informative video.
- Draft a video script using the client FAQs, aiming to educate and engage a millennial audience.



Research Report to Infographic

- Summarize the research report into an infographic, highlighting key statistics and trends in financial markets.
- Create a visually appealing infographic from the report, focusing on the most impactful data points.

Content Repurposing Strategies



Case Study to Social Media Carousel

- Condense the case study into a series of carousel posts for Instagram, focusing on the problem, solution, and results.
- Design a LinkedIn carousel post from the case study, emphasizing the client challenge and the successful outcome.



E-book to Email Series

- Break down the e-book into a series of email newsletters, each focusing on a different chapter or section.
- Create a drip email campaign using the content from the e-book, designed to nurture leads over a month.



Whitepaper to Webinar

- Outline a webinar based on the whitepaper, highlighting the main findings and their implications for investors.
- Develop a webinar script using the whitepaper, focusing on actionable strategies for financial advisors.



Market Analysis to Social Media Posts

- Convert the market analysis into a series of LinkedIn posts, each focusing on a different trend or insight.
- Summarize the market analysis into Instagram stories, highlighting key takeaways for young investors.



Financial Tips to TikTok Scripts

- Create short TikTok scripts from the financial tips, designed to engage and educate a Gen Z audience.
- Draft a series of TikTok videos using the tips, focusing on quick, actionable advice.

Go into AI, leverage the following AI prompt, edit as needed, and paste into your AI query:

Content Creation

"I am a financial professional specializing in [niche], offering services such as [add services and any additional information you find relevant to share about you, your company, etc.].

Using the copy provided below, please create [# of social posts as part of a drip campaign series] of social media posts targeting [the audience] to [your goal: ex. Convert prospects into clients, educate my clients on the breadth of services I provide and my thought leadership on this topic].

Each post should focus on key [insert topic - e.g., tax-efficient investment strategies] relevant to [define audience - e.g., investors in the accumulation phase] who may be considering or needing to [find a new financial advisor to review their financial goals]. Focus on solving common issues people face when [planning for retirement, estate planning, preparing for college, etc.].

Terms for Enhancing Copywriting

- **Paraphrase:** Reword content to be repurposed.
- **Rephrase:** Alter the perspective to refresh the narrative.
- **Expand:** Provide additional information on the summarized copy.
- **Reinterpret:** Offer new meaning or insight.
- **Simplify:** Make complex content more accessible.
- **Elaborate:** Add detailed explanations.
- **Adapt:** Modify content for different audiences or purposes.
- **Enrich/Embellish:** Add flair to make the content engaging.
- **Illustrate:** Create hypothetical examples for clarity.
- **Humanize:** Make the text relatable to the audience.



Samantha Russell · 1st

Chief Evangelist at FMG Suite | Keynote Speaker | Marketing + Finance+ ...

[Book an appointment](#)

2mo · 🌐

This is one of the **EASIEST** ways to have a guaranteed hit of a social media post!

REPOST your best performing content.

I'm not just talking about **REPURPOSING** (where you take a clip from a longer video or podcast and reshare it on social)... I'm talking copy and paste the exact post you shared previously. If it performed well once, it will almost always perform well again.

Here's how I do it:

1. Every six months, go back through your posts from the previous 6-12 months and look at what performed best. Copy and paste (unless it was timely, news - based content or a personal update).
2. If the post had a chart or graph that went with it - I'd keep it. If it had a personal photo - I might consider changing the photo but leaving the wording the same (as long as it was a great lesson you were sharing and not just a personal update!).

Remember:

- ◆ Only a small % of your followers see your content each time you post - so for many people, this will be their **FIRSST** time seeing it!
- ◆ Even if someone saw it once before - if its a good post, its not like they will be annoyed that you are resharing. They either: won't remember it at all, or if they do - that means it was great content and they'll be happy to see it again!
- ◆ When you feel like if you have to say the same thing one more time you might 🙄, many people in your network are **JUST** hearing it for the very first time.

LinkedIn Tips

Playbook for LinkedIn Content

Minimum 3 posts per week:

- 1 that shows off your expertise
 - 1 that starts conversation/gets 👁️
 - 1 that shares personal photo/angle
- ask a question that is EASY for people to answer whenever you can

The mix is important! 🙌

**If you don't engage with
others,
it won't matter how good
your content is**

Playbook for LinkedIn Engagement

- 5 comments to 1st degree connections
- 5 comments to 2nd/3rd degree connections
- Responses to all comments on content
- 5 DMs
- 3 connection requests
- 3 follows

That takes about 15-20 minutes 🙌

← **This is the part you
CANNOT outsource.**

YOUR TEAM has to do this.

Promoting Events on LinkedIn

- **Leave comments on 5-10 other people's posts**

Engage with your network before posting to prime the algorithm

- **Create a LinkedIn event to promote your event**

Leverage LinkedIn's event feature to increase visibility and attendance

- **Focus posts on the benefits of joining the event**

Highlight the value proposition to encourage sign-ups

- **Send event invites as direct messages**

Personally reach out to your connections to drive registration

- **Start posts by addressing a problem your audience has**

Capture attention by addressing a pain point your audience faces

- **Offer a quick win to engage your audience**

Provide immediate value to entice readers to learn more

- **Use a call-to-action in your posts**

Prompt users to take action by commenting a keyword for the registration link

- **Repurpose webinar content after the event**

Maximize the value of your event content by sharing it on social media

here's a LinkedIn Insider tip that no



in Here's a LinkedIn Insider Tip that no one tells you.

 @fmgadvisormarketing

LinkedIn Insider Tip That No One Tells You About



16



Dislike



2



Share



fmg

Demo - Enhancing Posts with Canva

Recommended Content: April

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 - sends the last week of every month!

10-Minute Marketing Calendar

April 2025

April is about fresh starts and financial focus. With Tax Day approaching, it's the right time to provide clients with guidance and reminders while also highlighting financial literacy. There are also opportunities for engagement, from celebrating National Volunteer Month to recognizing Easter and Passover. Whether you're offering practical advice or sharing moments of connection, April's calendar is packed with ways to stay relevant.

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

Calendar Key

Automation Canva Downloadable Email Social Web Content

Filter

Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	30	31	1	2	3	4	5
		April is Financial Literac... April is Financial Literac... 7 Historically Epic April ...	World Autism Awarene...	Ages 20-39 Newsletter ...	IRA Contribution Deadl...		
	6	7	8	9	10	11	12
	Weekly Market Insights Monthly Market Insights	National Volunteer Mon...	Business Owners Mess...	Client Nurturing (Seaso...	National Parkinson's Day	Passover Wishes Passover (Celebrations...	
	13	14	15	16	17	18	19
	Weekly Market Insights	Tax Day Video of the Month	Ages 40-54 Newsletter ...	Understanding Social S...	Ages 55-65 Newsletter ...		
	20	21	22	23	24	25	26
Easter (Celebrations De...	Weekly Market Insights	Earth Day (Celebration...	Investing for Impact	Social Security Newslet...	Happy Arbor Day		
	27	28	29	30	1	2	3
	Weekly Market Insights	Ages 66+ Messages Chart of the Month	International Jazz Day				

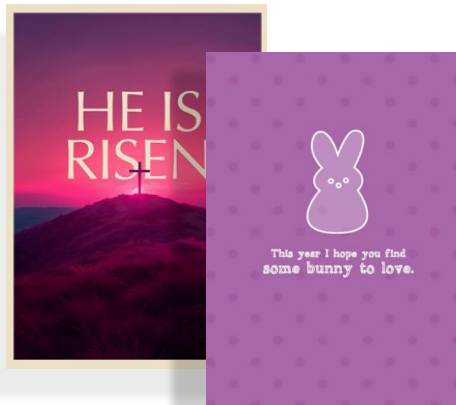
Content Planning

Holidays/Observances

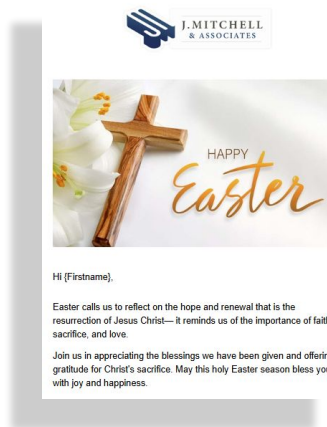
April

- April Fool's Day (4/1)
(Social)
- Tax Day
(4/15) (Social)
- Easter Holiday
(4/20) (Email, Card,
& Social)
- Passover
(4/12) (Social & Automation)

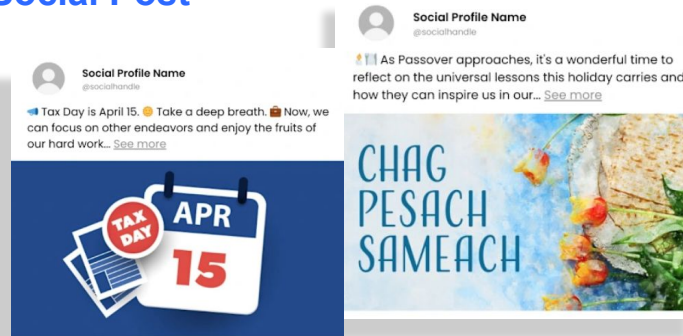
Greeting Card



Email



Social Post




Content Planning

April is the month of:

- National Volunteer Month (Article & Instagram)
- National Financial Literacy Month (Social, Social Sequences, Email Automation & Email)
- National Social Security Month (Social,

Email & Article



Hi (Firstname),

Are your financial goals well-defined?

While "I want to have lots of money" may sound like a great goal, it's just too vague. How much is "lots"? If you don't know ... how will you know when you have it? And will the "lots" of today be enough for tomorrow?

In developing your financial goals, make sure they're S.M.A.R.T. ...

- Specific
- Measurable
- Attainable
- Relevant
- Timely

April is Financial Literacy Month. To clearly define your financial goals are important. If you'd like help setting a call.

This material was developed and is not intended to be of interest. FMG Suite, LLC, SEC-registered investment advisor. General information and should not be construed as an offer of securities.



RETIREMENT - READ TIME: 3 MIN

Volunteering in Retirement

"This generation got no destination to hold... We are volunteers of America"
"Volunteers" by Jefferson Airplane

Those of a certain age will recall these Jefferson Airplane lyrics as a call to action, though for a different period and place. Even with the passage of time and through a lifetime of changes, the desire of baby boomers to make an impact on the world has not diminished.

Retirement is no longer about the hammock or unending hours of golf. It is a period of rejuvenation, second chances, and renewed growth. For many, this new phase includes contributing their time and talents to an organization in need.

Before You Start

An important first step is to engage in honest self-assessment. Inventory your skill set and interests. This will help identify what sort of volunteering opportunities are the best match for you.

Determine the commitment you are willing to make. Is this something that you want to devote 5-10 hours a week to, or are you willing to commit to more time? Is this something you want to do locally, around the nation, or even the globe? Will this volunteering be done individually, as a couple, or as a group?

Survey the Waters

There are plenty of resources to get a good view of the opportunities that exist. One place to start is by asking friends, family, and colleagues. Another option is to use one or more of the many tools created to help identify volunteering ideas that may deserve your consideration. For instance, the AmeriCorps website is one such tool run by the federal government. You may also want to take a look at the VolunteerMatch website.

Another approach may be to pick charities that you support and check out their volunteer opportunities. Don't be afraid to call them since some opportunities may not be advertised.

If you do choose to volunteer during retirement, you may find that you will receive as much as you give.

Social



Social Profile Name
@socialhandle

👉 Hey everyone! As more Americans turn 65, it's crucial to understand your Social Security retirement age and its impact on your investment strategy. Here's what you need to know:

- ◆ The full Social Security retirement age has gradually risen from 65 to 67 due to changes enacted in 1983.
- ◆ Those born between 1943 and 1954 have a full retirement age of 66, while those born in 1960 or later have a full retirement age of 67.
- ◆ Waiting until 70 to claim your benefits will allow you to receive 100% of the full retirement benefit.
- ◆ If you delay claiming your benefits until age 70, your monthly benefit will increase by 8% for each year you wait.



Social Profile Name
@socialhandle

🌟 April is Financial Literacy Month! 🌟 Let's take a moment to celebrate the importance of understanding our finances and making... [See more](#)



Product Updates

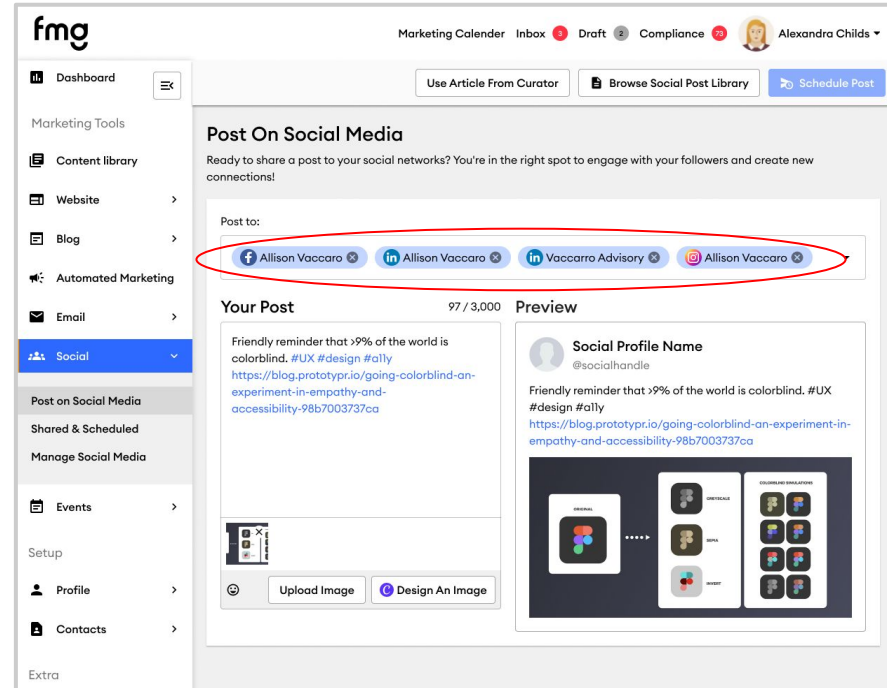
Profile Specific Social Posts Desktop & Mobile!

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.

COMING SOON to FMG's Mobile App!
Now available on desktop.



The screenshot displays the FMG admin interface for creating a social media post. The left sidebar contains navigation options: Dashboard, Marketing Tools, Content library, Website, Blog, Automated Marketing, Email, Social (selected), Post on Social Media, Shared & Scheduled, Manage Social Media, Events, Setup, Profile, and Contacts. The main content area is titled 'Post On Social Media' and includes a 'Marketing Calendar' and 'Inbox' notification. The 'Post to:' field is highlighted with a red oval, showing four selected social profiles: Allison Vaccaro (Facebook), Allison Vaccaro (LinkedIn), Vaccarro Advisory (LinkedIn), and Allison Vaccaro (Instagram). The 'Your Post' section shows a draft post with a link and a placeholder image. The 'Preview' section shows the post as it will appear on a social profile.

COMING SOON!

"Save as Template" for Content Library Emails

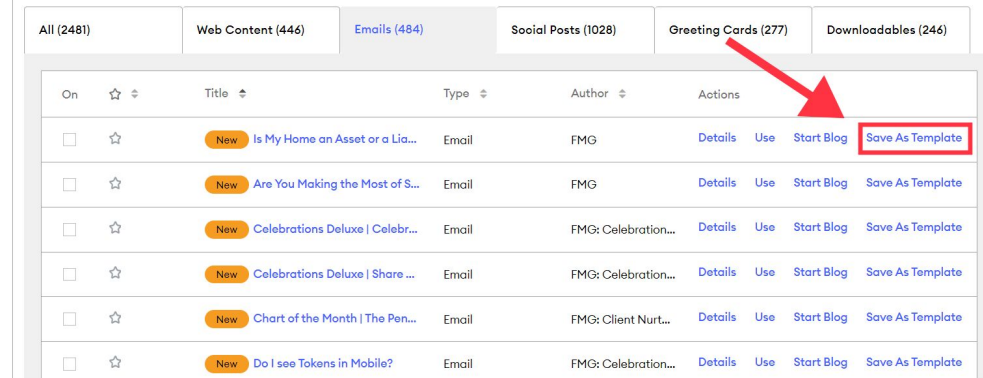
Now you can save emails as templates to reuse later!

Now you can now turn content library emails into email templates—right from your FMG admin!

Customize your email, or save as is!

Just hit the save as template button, and you will automatically save your email to templates.

fmg



On	☆	Title	Type	Author	Actions
<input type="checkbox"/>	☆	New Is My Home an Asset or a Lia...	Email	FMG	Details Use Start Blog Save As Template
<input type="checkbox"/>	☆	New Are You Making the Most of S...	Email	FMG	Details Use Start Blog Save As Template
<input type="checkbox"/>	☆	New Celebrations Deluxe Celebr...	Email	FMG: Celebration...	Details Use Start Blog Save As Template
<input type="checkbox"/>	☆	New Celebrations Deluxe Share ...	Email	FMG: Celebration...	Details Use Start Blog Save As Template
<input type="checkbox"/>	☆	New Chart of the Month The Pen...	Email	FMG: Client Nurt...	Details Use Start Blog Save As Template
<input type="checkbox"/>	☆	New Do I see Tokens in Mobile?	Email	FMG: Celebration...	Details Use Start Blog Save As Template

fmg

Today's Giveaways 🎉

Content Giveaway

EXCLUSIVELY FOR REGISTRANTS

- AI Social Media Prompt Guide
- Answer Engine Optimization: Impact & Best Practices
- Improve Your LinkedIn Profile



5 Steps to Drastically Improve Your LinkedIn Profile



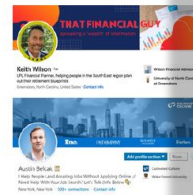
Here are the five steps we recommend all advisors take to optimize their LinkedIn profiles and build their brands on social.

1. Set Up Personal and Business Pages

Step 1: Claim your business name/profile on both regardless

Step 2: Establish a face for your brand

Step 3: Have employees/personal pages share content that tags the business page or re-share content from a business page. Expect the Personal page to perform better



Unleash AI: Creating Captivating Social Posts



New to AI and wondering how to harness its power for content creation? Dive into our guide to start crafting impactful social media posts effortlessly.



Answer Engine Optimization (AEO): Impact & Best Practices for Financial Advisors



AEO is how you structure your content to be picked up by AI search tools and voice assistants. It focuses on providing clear, direct answers to questions your potential clients are asking, helping your financial expertise appear in featured snippets and AI-generated responses.

Why AEO Matters for Financial Advisors?

- Over 50% of searches are voice-based
- AI-driven Search (Google SGE, ChatGPT) prioritizes direct answers
- Google's Featured Snippets drive trust and visibility
- Advisors who rank for direct answers generate more inbound leads

Key AEO Strategies

1. Target question-based queries (especially from "People Also Ask" sections)
2. Optimize content for featured snippets with bulleted lists and concise answers
3. Structure your content with clear, organized Q&A sections
4. Write in a conversational Q&A style that AI search tools can easily parse
5. Place clear, direct answers at the top of your content

AI Prompts:

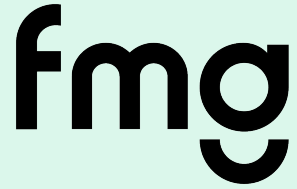
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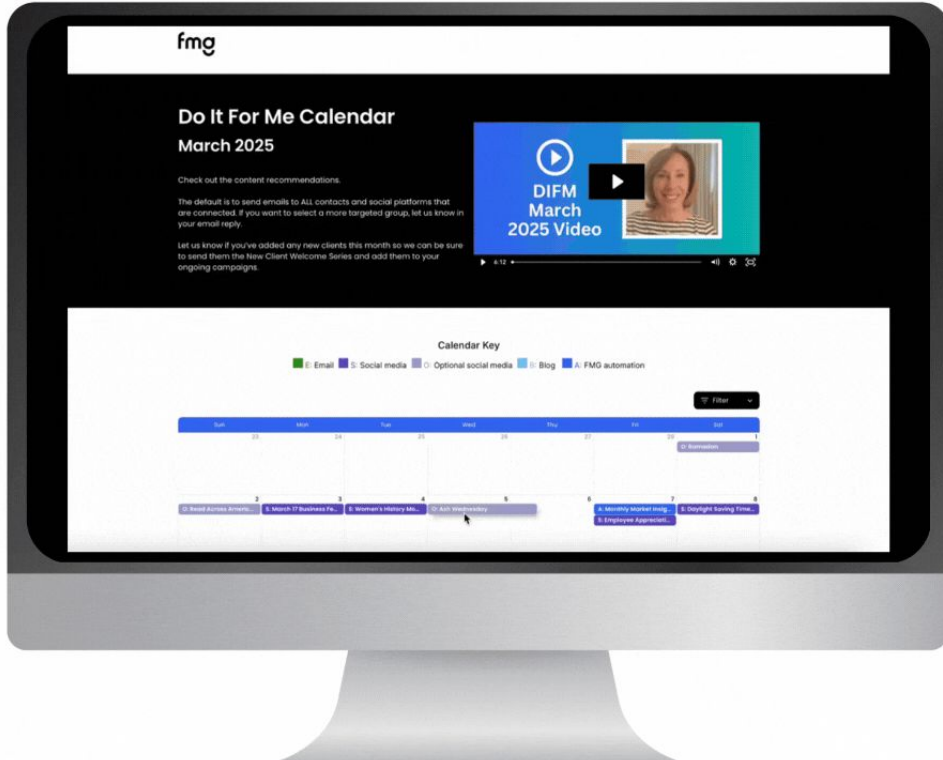
te.com 888-259-2420 1



Looking to Elevate Your Marketing for an Impactful 2025?

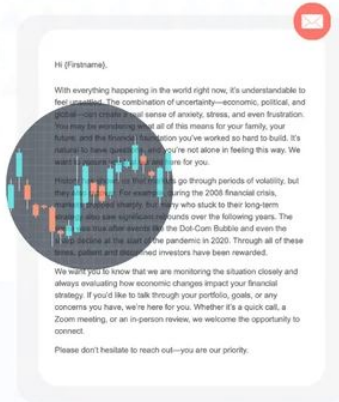
'Do It For Me'

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

Addressing Financial Wellness



TIMELY, authentic,
★★★★★ content

Exclusive content from ...

Do It For Me
MARKETING

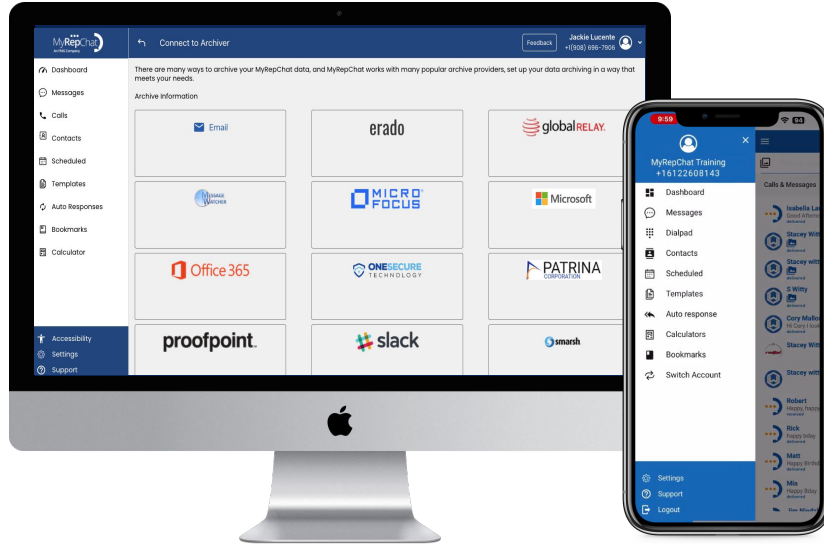


**Scan QR code to utilize
these FREE resources!**

Your Complimentary Financial Wellness Resources:

- **“Staying Focused in Uncertain Times”** – A client email reinforcing long-term financial strategies.
- **“Spring into Financial Wellness”** – A helpful email encouraging clients to refresh and realign their financial goals.
- **Financial Wellness Blog** – Shareable content designed to educate and engage your audience with meaningful insights.

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?

Thursday, April 24th -
11am PT / 1pm CT / 2pm ET



Download the FMG App!



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