



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



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 [Descript](#) 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

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

300%

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



80%

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





FMG's Video Email Widget

FMG's Video Email Widget allows you to upload a video straight to an email, no need to host it elsewhere, create a thumbnail or any extra steps!

[Learn More >](#)



Somebody came back to me and said 'you know your high school looks just like my high school!' and another said 'I had this happen in my family when I was growing up and I understand what you're talking about'...There's an emotional connection that you make with folks that watch this [personal story video]. It's an interesting way to have a personal connection with others

Joe Budd
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