

For Financial Professional Use Only

HOW TO GET STARTEDⁱ:

1. Pick your social channels: LinkedIn, Facebook, Twitter, and/or Instagram
2. Complete your profiles
3. Follow other businesses, brands, and prospects
4. Keep an eye on your mentions
5. Define your content strategy
6. Assemble your content calendar
7. Engage with others
8. Find your brand voice
9. Promote your social channels
10. Monitor your social presence

YOUR OBJECTIVES:

- Increase your brand awareness
- Research and learn about your clients
- Generate new leads for your business
- Boost your brand engagement – likes, shares, comments per post
- Increase traffic to your company website
- Promoting events
- Showing off your brand's personality

WAYS TO CONNECT & ENGAGE WITH YOUR FOLLOWERS:

- Give credit to posts you share (ex - via ThinkAdvisor) and tag for increased authority
- Initiate conversation with your followers i.e. share your photos
- Ask specific, pointed questions (ask them something they care about)
- Promote and engage with industry content
- Like, share, comment, and mention
- You'll want to be continually "favorite"-ing, retweeting, and responding to tweets from your audience

DEFINE YOUR VOICE/TONEⁱⁱ:

Below we break down brand's voice into four categories: Character/Persona, Tone, Language, and Purpose. Here's a list of attributes for each category—which of these descriptors belong to your brand? Check all that apply. Stick to what you believe represents you best and remember, consistency is key.

Character/Persona

- ☐ Friendly
- ☐ Warm
- ☐ Inspiring
- ☐ Playful
- ☐ Authoritative
- ☐ Professional

Tone

- ☐ Personal
- ☐ Humble
- ☐ Clinical
- ☐ Honest
- ☐ Direct
- ☐ Scientific

Language

- ☐ Complex
- ☐ Savvy
- ☐ Insider
- ☐ Serious
- ☐ Simple
- ☐ Jargon-filled
- ☐ Fun
- ☐ Whimsical

Purpose

- ☐ Engage
- ☐ Educate
- ☐ Inform
- ☐ Enable
- ☐ Entertain
- ☐ Delight
- ☐ Sell
- ☐ Amplify



GUIDELINES PER CHANNEL:

LinkedIn: professional, more serious/straight to the point

Facebook: mixture of educational, fun, entertaining

Twitter: news oriented, opportunity to join the conversation, fuel excitement about your service

Instagram: use it to familiarize followers with your brand and taking followers behind the scenes

*****Don't forget you can cross promote between channels***

CONTENT & POST FREQUENCY per WEEK:

FACEBOOK 3/week

- [1] Original Content [see list below]
- [2] Curated Content [business partners, blogs, websites]

TWITTER 7/week

- [2] Original Content [see list below]
- [4] Curated Content [business partners, blogs, websites]
- [1] Lead Generation [website]

LINKEDIN 3/week

- [1] Original Content [see list below]
- [1] Curated Content [business partners, blogs, websites]
- [1] Lead Generation [website]

INSTAGRAM 1/week

- [1] Original Content [see list below]



IDEAS FOR ORIGINAL CONTENT:

- | | | | |
|-----------------------|-----------------------|-------------------------|-------------------|
| • Ask questions | • Holidays | • Polls | • Testimonials |
| • Blog content | • Industry news | • Product demonstration | • Tips |
| • Brand announcements | • Infographics | • Product review | • Trending topics |
| • Breaking news | • Job openings | • Product spotlight | • Whitepapers |
| • Community Outreach | • Motivational quotes | • Products and services | |
| • Events | • Office update | • Team photos | |
| • GIFS and memes | • Office visit photos | • Tease launches | |

CALL-TO-ACTION EXAMPLES:

- | | | |
|---------------------------|-----------------|----------------|
| • Subscribe to email list | • Share now | • Chat now |
| • Like/follow us | • Comment now | • Contact us |
| • Learn more | • Visit website | • Testimonials |

THEMES/DAY:

Monday #MotivationMonday #MarketingMonday #MemeMonday

Tuesday #TransformationTuesday #TipTuesday #TechTuesday #TopicTuesday

Wednesday #WednesdayWisdom

Thursday #TBT #ThursdayThoughts

Friday #FeatureFriday #FlashbackFriday #FeelGoodFriday

HASHTAGS:

LinkedIn, Twitter, Instagram

**Facebook hashtags do not work*

Post hashtags based on messaging of content:

#____Team
#____TeamEvents
#____TeamWebinars
#____TeamGivesBack
#annuity
#assistedliving
#budget
#business
#careplanning
#entrepreneur
#family
#finance
#financial
#financialadvisor
#financialeducation
#financialfreedom
#financialgoals
#financialindependence
#financialliteracy
#financialplanner
#financialplanning
#financialservices
#insurance
#insuranceagent
#invest
#investing
#investment
#investments
#lifeinsurance
#money
#personalfinance
#realestate
#retired
#retirement
#retirementcommunity
#retirementgoals
#retirementplanning
#savings
#seniorcare
#seniorliving
#wealth
#wealthmanagement



HELPFUL COMPLIANCE TIPS:

You should be mindful of your firm's compliance policies and procedures related to social media before you begin posting information on public forums.

If you are associated with a broker-dealer and/or an investment advisory firm, you will likely be required to submit all social media posts to your compliance department prior to use, regardless if the post is involving an outside business activity. Verify your firm's process first.

You should only post information that relevant to the products and services you provide.

State regulators often receive complaints from clients stating they were confused about the role and services provided (or not provided) by their financial professional. The confusion often comes from how the financial professional holds themselves out to the public through the use of websites and social media postings.

Be mindful of your sources and the validity of the information you intend to use!

Make sure your posts are coming from reliable sources and the information is still current. You wouldn't want to post information that is out-of-date or misleading as it could cause client complaints, or worse!

ⁱ 10 Social Media Marketing Basics for Business | sproutsocial.com/insights

ⁱⁱ Sample Social Editorial Calendar | marketo.com/worksheets/social-media-editorial-calendar/



JULY 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	Independence Day Holiday 3	Independence Day 4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Notes

Theme

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AUGUST 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

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SEPTEMBER 2020

all points
media

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	Labor Day 7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

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OCTOBER 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	Columbus Day 12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	Halloween 31

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NOVEMBER 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	Veterans Day 11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	Thanksgiving Day 26	27	28
29	30					

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DECEMBER 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	Christmas 25	26
27	28	29	30	31		

Notes

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