

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

CALL-TO-ACTION EXAMPLES:

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

ⁱ10 Social Media Marketing Basics for Business | sproutsocial.com/insights

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



JANUARY 2021

SUN	MON	TUE	WED	THU	FRI	SAT
					New Year's Day 1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	Martin Luther King Day 18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Theme

Notes



FEBRUARY 2021

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
Valentine's Day 14	President's Day 15	16	17	18	19	20
21	22	23	24	25	26	27
28						

Theme

Notes



MARCH 2021

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
Daylight Saving (begin) 14	15	16	St. Patrick's Day 17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Theme

Notes



APRIL 2021

SUN	MON	TUE	WED	THU	FRI	SAT
				April Fool's Day 1	2	3
Easter 4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	Admin Assistants Day 21	22	23	24
25	26	27	28	29	30	

Theme

Notes



MAY 2021

SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
Mother's Day 9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	Memorial Day 31					

Theme

Notes



JUNE 2021

SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	Flag Day 14	15	16	17	18	19
Father's Day 20	21	22	23	24	25	26
27	28	29	30			

Theme

Notes



JULY 2021

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	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

Theme

Notes



AUGUST 2021

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				

Theme

Notes



SEPTEMBER 2021

SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	4
5	Labor Day 6	Rosh Hashanah 7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Theme

Notes



OCTOBER 2021

SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5	6	7	8	9
10	Columbus Day 11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
Halloween 31						

Theme

Notes



NOVEMBER 2021

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
Daylight Savings (end) 7	8	9	10	Veterans Day 11	12	13
14	15	16	17	18	19	20
21	22	23	24	Thanksgiving 25	26	27
Hanukkah Begins 28	29	30				

Theme

Notes



DECEMBER 2021

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 Day 25
Kwanzaa Begins 26	27	28	29	30	New Year's Eve 31	

Theme

Notes