

Compelling

# CONTENT MARKETING



STEPHANIE  
BOGAN



JARROD  
MUSICK



# SYSTEMS = CONSISTENCY

- ✓ Direct way to demonstrate value
- ✓ Can be a huge distraction
- ✓ Experience is everything

L I M I T L E S S



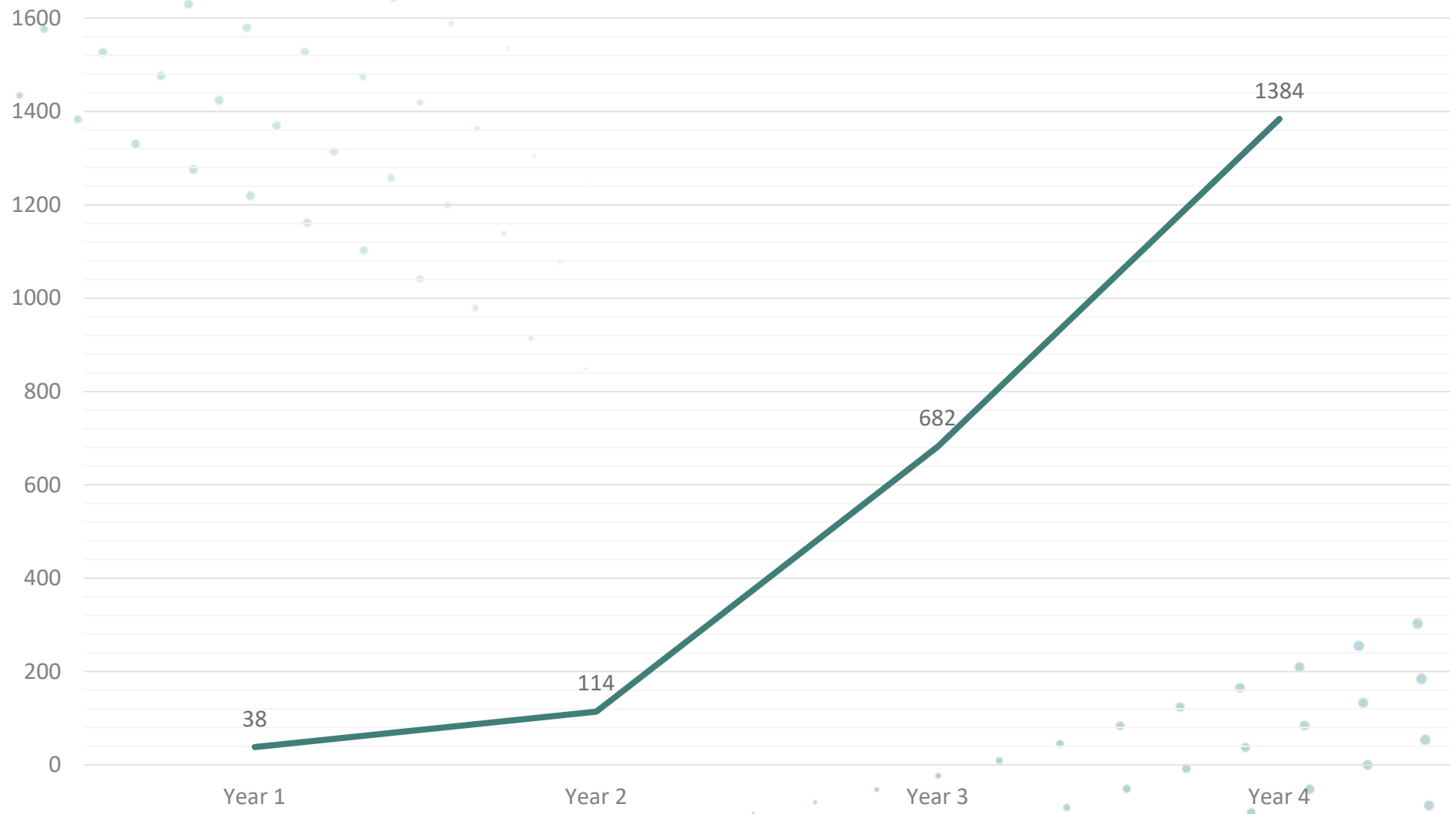
DEMONSTRATE  
VALUE  
CREATE  
CURIOSITY

# THE 10 RULES OF *Content Marketing...*

1. Find your following
2. Deliver value in excess of the sale
3. Be obsessed about your audience
4. Radically relevant
  - Charlie Brown's mom – don't be squishy
  - Crap stinks
5. Be real, not refined
6. Have a 1-track mind = email
7. Consistency compounds
8. It's all about...
9. Rip off, repurpose & remarket
10. Just do it

L I M I T L E S S

# Sample Content Reach Over Time



L I M I T L E S S



DESTINYCAPITAL    Becoming a Client   Investment Management   Our Team   **Blog**   Contact   eMoney Login

## BLOG

# Receive Content to Your Inbox


We cover topics around Impact, Planning, Investment News, and helpful insights for managing your wealth.

First Name

Last Name


Email

**SIGN ME UP!**




**Markets and Economy Update – July 2022**

by Tim Doyle, CFP®, MBA



**Markets and Economy Update – June 2022**

by Tim Doyle, CFP®, MBA



**Markets and Economy Update – May 2022**

by Tim Doyle, CFP®, MBA

### Private Wealth Management Podcast

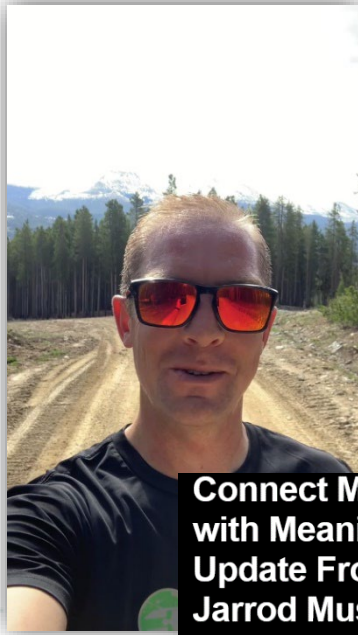
Bringing you engaging stories and key insights surrounding the complexities associated with significant wealth, including:

- Intergenerational Planning
- Philanthropic Giving
- Non-Traditional Assets
- Managing Family Wealth

**LISTEN | PASSION ASSETS: INVESTING IN ART**

When a passion for collecting evolves into something of considerable value, new issues are raised. Hear what the professionals have to say about the best practices and pitfalls of collecting art and collectibles.

[Learn More](#)



**Connect Money with Meaning - Update From CEO Jarrod Musick**

2 months ago



**Embrace the Seasons and Cycles of Your Life**

By **Seth Streeter, MS, CFP®, CIFA™**  
Chief Impact Officer and Founder

"Embrace the seasons and cycles of your life. There is magic in change." - David Bowie

"Aging is an extraordinary process where you become the person you always have been." - David Bowie

Summer has officially arrived. Students long-anticipated vacations, and hot weather is in the air. Celebrate the season with unique activities, sights, and aromas that bring joy to your life. Whether it's gardening, picnics, flowers, or beach days, embrace the season and make the most of it.



**Firm Announcements**

**Central Coast Business Times Best Places to Work 2022**

We are excited to be named one of the top 50 Central Coast Best Places to Work for 2022. The Pacific Coast Business Times, the weekly business journal for Ventura, Santa Barbara, and San Luis Obispo Counties, presents this award annually. Please read our full write up on this award on our website.

*I am proud to be associated with a firm that values integrity, mutual respect, high moral character, and a commitment to excellence. It is a privilege to work for a company that asks the question, "How can we make a difference?" and just a given. I believe that everyone is working to make the world a better place. It's a wonderful and inspiring experience to be part of a team that happens because of who they are and the values they live by. I have been attracted more than ever to the values and mission of this organization."*

**CORDANT**  
Wealth Partners

How We Help   About Us   Who We Serve   **Blog**   For Clients

**BLOG**

THE CORDANT WEALTH FINANCIAL CLARITY BREAK

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**RSU Taxes Explained + 4 Tax Strategies for 2022**

July 18, 2022 // by Isaac Presley, CFA®

**RSU Taxes Explained**

In this article, I'm sharing everything you need to know about how Restricted Stock Units (RSUs) are taxed. I'm also covering: What are RSUs? RSUs vs Options Little-known RSU tax strategies If you're ready to master RSU taxes and avoid overpaying the IRS in 2022, this article is for you. **KEY POINTS:** RSUs are a popular form of stock compensation that...

**3 Risk Reduction Strategies for Deferred Compensation Plans**


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- » Intel
- » Microsoft
- » Employee Benefit
- » Deferred Compensation & Pension
- » Employee Stock Purchase Plans
- » Mega Roth 401(k)
- » RSUs

**20/20 MONEY**



Hosted by **Adam Cmejla, CFP®**

**PODCAST**  
IPWM | AUGUST 22, 2022

**20/20 Money Episode #198 – An encore career: how to retire at 41 and explore other opportunities in optometry with Dr. Jennifer Stewart, OD**

Welcome to this episode of 20/20 Money! My guest on today's show is Dr. Jennifer Stewart. Jen joins me again on the show to talk about an interesting transition that's ...

"What you do, do naturally for 3 years."  
-Jarrod





WHAT MAKES A

# *Good Call to Action?*

- Interesting
- Relevant
- Think less "CLICK HERE" and more "Schedule your Free Call"
- Active verbs & short, punchy phrases

**Download our guide: *How to Make \$100,000 Per Year with 150 Clients.***

We'll show you exactly how the best gym owners are earning six figure incomes from single location gyms with no more than 150 members.

[DOWNLOAD THE GUIDE](#)



## Retirement Planning For Individuals Over Age 50

REDUCE TAXES · INVEST SMARTER · OPTIMIZE INCOME

GET YOUR FREE ASSESSMENT →

## Your Free Retirement Assessment™

A 3-step process showing how you can improve retirement success + lower your tax bill.

### Step #1 — Schedule 20-Min Call

A 20-minute phone call will give us both a chance to make sure your situation matches our expertise.

After all, you wouldn't see a Cardiologist if you needed foot surgery!

Schedule Your Call →

### Step #2 — Team Meeting

Like a doctor, it's important to diagnose before we prescribe.

The next step is meeting with our team (in-person or virtually). During this 1-hour meeting, our team will get crystal clear on your retirement goals, needs, and concerns.

### Step #3 — Review Assessment

With your Retirement Assessment complete, we will have another 1-hour meeting to review our findings and recommendations.

In plain English, we will explain exactly what you can do to improve your retirement plan, lower taxes, and optimize your investments.

## Your Free Retirement Assessment™

A 3-step process to help you evaluate our services and make an informed decision about working together.

- ✓ Tax Return Analysis
- ✓ Investment Analysis
- ✓ Retirement Answers

## Retirement Assessment

Prepared for  
MARK & JENNIFER

OFFER INCENTIVES / NEXT STEP



## Think About It!

At the end of this process, we will simply ask you to *think about it*. We are looking for long-term relationships, not a quick transaction. If you decide that we aren't a good fit, we will happily help you find another professional with the right expertise. **There is never a hard-sell or pressure to say "yes."**

## Step #1: Schedule 20-Minute Phone Call

[Click Here to Schedule](#) →

## Step #1: Schedule Your 20-minute Phone Call

The purpose of this call is to answer your questions and ensure our expertise matches your needs.

### 1 Choose Appointment

#### Step 1 - Intro Phone Call With Define Financial (20 minutes)

This is NOT a sales call. The purpose of this call is to answer your questions + determine if there is a potential fit between our expertise and your needs.

After we hang up, you will have one simple question to answer: "Does it make sense for Taylor and his team to create a Free Retirement Assessment & Tax Analysis for me?"

YOUR TIME ZONE

(GMT-4:00) Eastern Time

← PREVIOUS

MORE TIMES →

IN 3 WEEKS

Wednesday  
September 7

Thursday  
September 8

IN 4 WEEKS

Tuesday  
September 13

Wednesday  
September 14

Thursday  
September 15

1:30pm

2:00pm

2:30pm

3:00pm

3:30pm

Still Have Questions? Keep Reading...

Email  
is King.

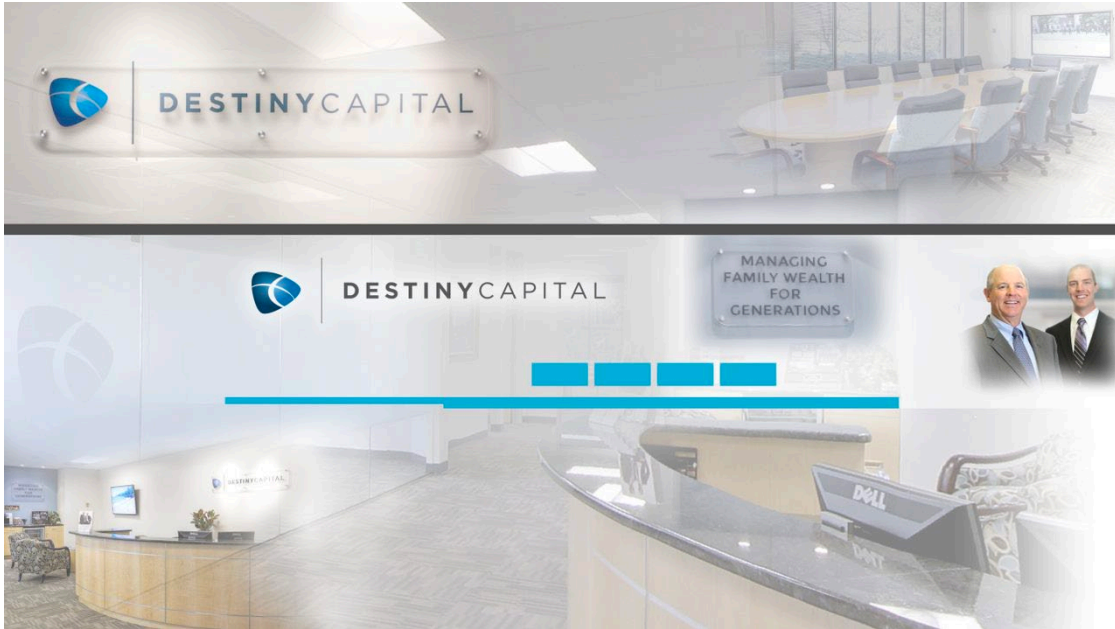


**Not quite ready to schedule an appointment? That's OK!**

Sign up for our quarterly newsletter

[Join Now](#)

# WE ALL GOTTA START SOMEWHERE...



A banner image for YouTube that says nothing about the client, who we served, or what we did. Just a picture of us and our office...

- Jarrod



"Bad lighting, dark backdrop, scanner and files on the desk, cheap white board...ugh.."

-Adam



# BUILD A *Permission Asset*

It's an attention economy | You have to get permission to enter  
Email is Permission | Deliver value

## TWO STEPS:


- 1 They have to know they need help.
- 2 They have to be curious, have challenges and be convinced you are the one to help in order for your content to be a catalyst for action.





# TAKE Action Don't MAKE Excuses

"I don't know what to talk about."  
"Someone has already done this."  
"It's not good enough."  
"What will people think?"

BE RIGHT  OF THE TIME

IT DOESN'T HAVE TO BE PERFECT  
TO BE GOOD.

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DO YOU HAVE

*What it  
Takes*

TO BE A  
CONTENT  
MARKETER

Do you read, listen to podcasts, watch speakers?

Do you think about what you learn?

Could you write down or record thoughts about what you think about what you learn?



# 4 STEPS TO SUCCESS



WRITE DOWN WHAT YOU  
READ/SEE/HEAR



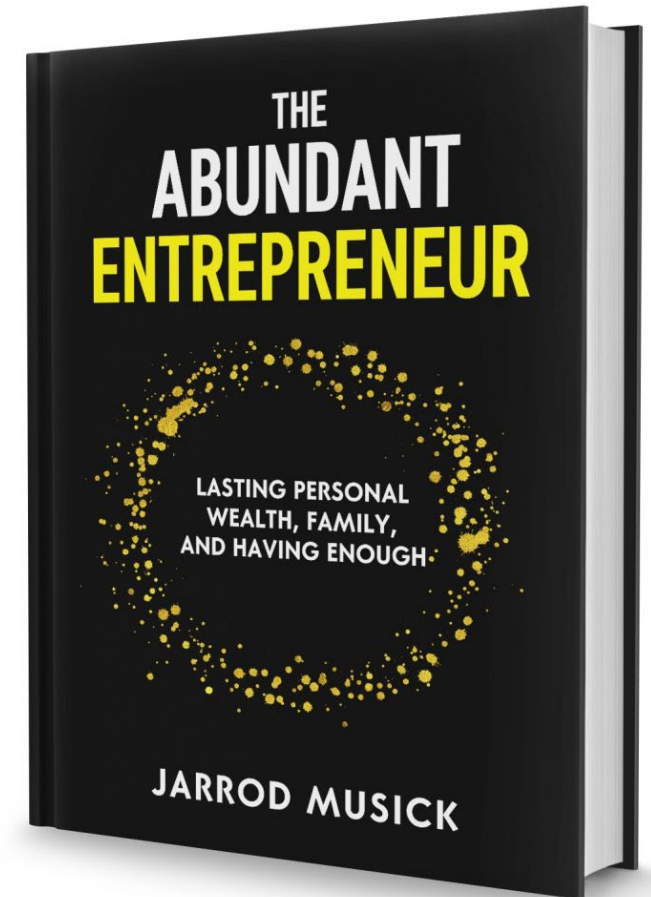
PUT YOUR SPIN ON IT



SEND IT OUT



REMIX CAN BE BETTER  
THAN THE ORIGINAL



*Why Wouldn't*  
YOU DO THIS?  
(WHY ARE YOU STUCK?)



# CREATING AN ANNUAL CONTENT CALENDAR

Best Practice Guide and Resources



## Creating and Managing a Content Calendar

In today's world of constant communication, building a personal relationship between your firm and your clients can be challenging. However, sharing helpful educational information with your clients, prospects and centers of influence to remind them of your presence is an important aspect of your business. There are many ways to hone in on a strategy with defined goals will maximize your time and ensure your content is seen and appreciated.

Deciding what content to share and what platforms you will use can be challenging at times. Remember that the goal is to create content that is applicable to your audience. Managing how and when your content is shared and what information can be made easier by using the following steps on your Annual Content Calendar.

### STEPS FOR CREATING A CONTENT CALENDAR

#### #1: IDENTIFY YOUR GOALS

Consider your communication end game. There are several possible goals that could have driving your content creation:

- Growing brand awareness
- Promoting referrals
- Improving client education
- Increasing your audience

Are you looking to share information with clients you already have? Do you want to encourage new clients to refer? Do you want to provide an additional service to your current clients? Are you just looking to expand your digital presence? Asking yourself these types of questions will help you define your content goals.

Think about which goals you are most excited to achieve and which are most important. These goals should be specific and measurable, so you will be able to easily track your efforts and see if they are working.

#### #2: FOCUS ON YOUR IDEAL CLIENT

Spend some time thinking about your ideal client's needs and what information does he need? What are his challenges and pain points? How can you spend her time? What media will he most likely tap into on a regular basis? Understanding your audience and clients at a deeper level will help you develop content that is valuable to them.

#### #3: SELECT MEDIA CHANNELS

Begin brainstorming what information you will share and consider which distribution channel you naturally gravitate toward by identifying your strengths as a communicator. Do you have a penchant for explaining financial concepts in a way that is amusing and relatable? You may find podcasts a good fit. Do you engage your clients in meaningful

## Annual Content Calendar



INSTRUCTIONS: Update and customize this calendar to organize your communications and content. An example of content has been provided for the month of January. As you build your own, be sure to customize the audience to align with your communication groups. This may include specific centers of influence (CPA, attorneys, etc.), only top clients or groups of clients who share interests / demographics.

MONTH	Content Type	Goal Date	Status	Clients	COIs	Prospects / Mailing List	Notes
<b>January</b>							
Happy New Years Cards	Mailed	12/27/2019	Sent	x	x		Custom cards designed with fun quotes from each team member, signed by team.
Retirement Resolutions Count Down	Social Media	1/3/2020	Sent	x		x	
Bring on the New Year (Client appreciation)	Newsletter	1/6/2020	Drafted	x	x	x	Thank you 'letter' to clients, share what's ahead for new year, 5 tips for retirement resolutions.
"How Not to Run Out of Money in Retirement"	Social Media	1/10/2020	Drafting	x	x	x	Caption from recent speaking event held
Retirement Planning in your 50s	Blog post	1/20/2020	Pending	x	x	x	Share Elizabeth's story, post to social media & website
Retirement Planning in Your 50s	Social Media	1/27/2020	Pending				Short version of blog post
<b>February</b>							
<b>March</b>							



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## LEARN MORE

- Coming Up With Content Ideas That Will Resonate With Your Clients And Prospects with Carl Richards, Michael Kitces
- Permission Marketing: Turning Strangers into Friends And Friends Into Customers, Seth Godin
- The Practice, Seth Godin
- Expert Secrets: The Underground Playbook for Creating a Mass Movement of People Who Will Pay for Your Advice, Russell Brunson



## ADAPT & APPLY

- Use the Annual Content Calendar Guide to help you plan and set up your own Annual Content Calendar
- Complete your 1-Page Marketing Plan and Marketing Action Plan
- Begin tracing your newest leads with the New Business Source Tracking tool
- Review the Sample Marketing Mtg Agenda



## TAKE ACTION

- Open a MailChimp / other email marketing CRM account
- Build your email list
- Send your introductory email
- Create a content creation process



LIMITLESS Q&A