osaic CONNECTED

2-minute Video Starter Kit

One audience. One idea. One next step.

Use this guide to create your first advisor video in less than 10 minutes.

LET US HELP YOU START SIMPLE

Pick a topic. Fill in the blanks. Make the message your own.

GETTING STARTED

From idea to ready-to-record

This kit is designed to help you move from thinking about video to creating it. Begin by selecting one of the five templated topics and filling in the blanks with language that sounds natural to you.

When you are comfortable with the formula, begin developing topics that align with your audience, expertise, and marketing priorities. Keep each video focused, useful, and easy to act on, and always follow standard advertising supervision, review, and approval processes before using the content.

The 2-minute video formula

HOOK	MESSAGE	CALL TO ACTION
Give the viewer a reason to keep listening.	Communicate one useful idea, not everything you know.	Give the viewer a logical, clear, and simple next step.

Call-to-action examples

- ✓ Schedule a conversation.
- ✓ Review your current plan.
- ✓ Discuss this topic with your financial professional.
- ✓ Reach out if you have questions.
- ✓ Make a list of questions before your next meeting.
- ✓ Consider whether this applies to your situation.

VIDEO TIP

Authentic and helpful outperforms polished and perfect. Focus on providing value, not producing a commercial.

SEE THE FORMULA IN ACTION

Completed example

WHAT NEW CLIENTS CAN EXPECT IN A FIRST MEETING

HOOK	“Not sure what actually happens when you meet with a financial advisor for the first time?”
MESSAGE	“Our first conversation is not about making immediate decisions. It is an opportunity to understand what matters to you, what questions you have, and what you would like your financial plan to help you accomplish.”
CALL TO ACTION	“If you have been considering meeting with an advisor, make a short list of the questions you would want answered in that first conversation.”

Pro-Tips

- Record near a window for good lighting.
- Look directly at the camera lens.
- Speak as if talking to one client.
- Keep it conversational.
- One take is often enough.

> **REMEMBER**
> The template is a starting point. Your goal is to sound like yourself, not like you are reading a script.

FILL-IN-THE-BLANK TEMPLATES

Choose a topic and make it yours

TOPIC 1

Why I became a financial advisor

HOOK

"I decided to become a financial advisor after _____."

MESSAGE

"That experience taught me _____. Today, it shapes how I help clients by _____."

CALL TO ACTION

"If you are looking for an advisor who values _____, I invite you to _____."

PRO TIP: *Speak from experience and keep the story focused on the viewer's takeaway.*

TOPIC 2

What to expect in the first meeting

HOOK

"If you have never met with a financial advisor, you may be wondering _____."

MESSAGE

"During our first meeting, we focus on _____. You do not need to arrive with _____. It helps if you bring or think about _____."

CALL TO ACTION

"Before meeting with an advisor, write down _____ questions you want the conversation to answer."

PRO TIP: *Use reassuring, plain language and remove unnecessary industry terms.*

FILL-IN-THE-BLANK TEMPLATES

TOPIC 3

One retirement planning consideration

HOOK

"One question I often hear from people approaching retirement is _____."

MESSAGE

"A helpful place to begin is _____. This matters because _____."

CALL TO ACTION

"If retirement is becoming more immediate for you, consider reviewing _____."

PRO TIP: *Choose one consideration. Save related ideas for future videos.*

TOPIC 4

Common financial planning mistake

HOOK

"One financial planning mistake I see people make is _____."

MESSAGE

"The challenge is _____. A better approach may be _____."

CALL TO ACTION

"Consider reviewing whether this applies to your own financial situation."

PRO TIP: *Avoid sounding judgmental. Frame the message as a helpful consideration.*

FILL-IN-THE-BLANK TEMPLATES

TOPIC 5

Why regular financial reviews matter

HOOK

"Your financial plan should change when your life changes."

MESSAGE

"A regular review gives you an opportunity to discuss changes such as _____. It also helps ensure that your plan continues to reflect _____."

CALL TO ACTION

"Before your next review, make a list of what has changed in your life during _____."

PRO TIP: *Use relatable life changes to make the topic feel immediate and relevant.*

Before you record

- ☐ Choose one audience
- ☐ Keep your video around 2 minutes
- ☐ End with one clear next step
- ☐ Focus on one key idea
- ☐ Speak conversationally, not perfectly
- ☐ Follow your firm's advertising review and approval process before use

KEEP GOING

Need more video ideas?

Start with questions clients ask every day. If one person asked it, others may be wondering the same thing.

Questions you answered this week	**Common misconceptions**	**Life events clients experience**
Planning considerations	**Market-related concerns**	**Financial habits and behaviors**

Build your next topic

My Hook

My One Message

My Clear Next Step

FINAL CHECK

Keep it focused, useful, and easy to act on. Then follow standard advertising supervision, review, and approval processes before using the content.