



Stop Guessing, Start Growing: Social Media that Works

Tuesday, May 26, 2026

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Today's Presenters



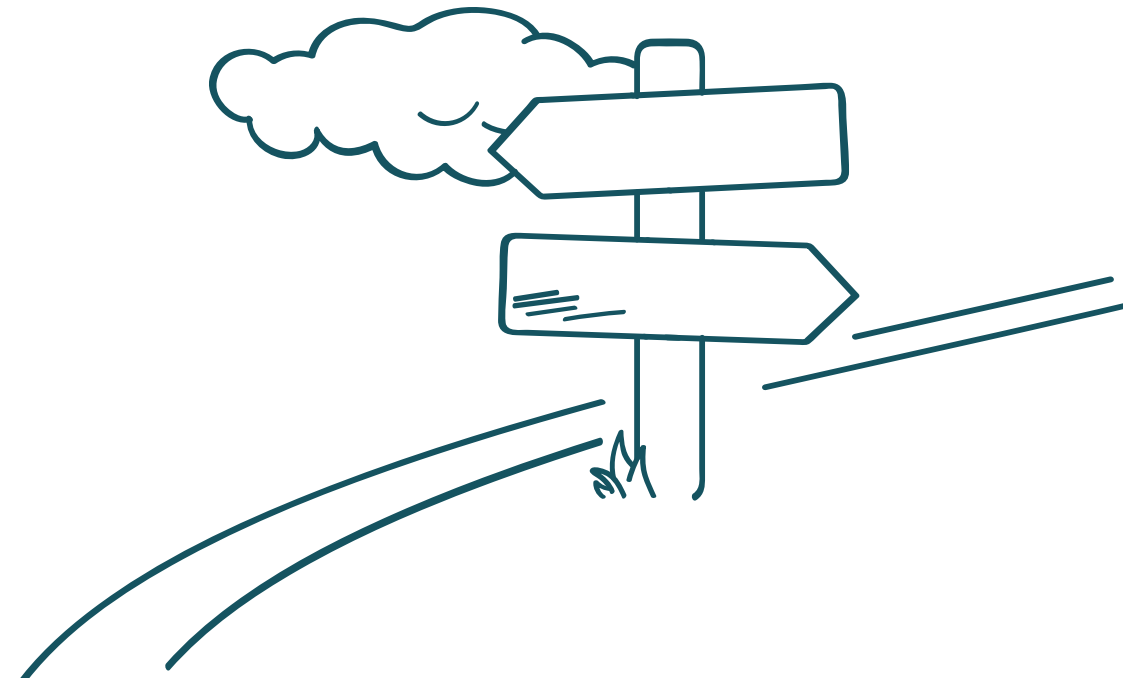
Alison Brucker
Advisor Marketing Manager



Madison Archibald
Marketing Coordinator

Agenda

- The Evolved Importance of Social Media Today
- Strategic Considerations for Simplification
- Report from the Field with Madison Archibald
- Q&A and Resources



What You'll Walk Away With

- 5 ready-to-use real life content generators
- 3 AI prompts
- A compliance-safe checklist
- A 7-day plan



Background



Why Social Media Still Matters in 2026

- “Nearly all consumers (96%) research financial advisors online before making a hiring decision.”*
- Wealthtender, 2025 Study
- Your social presence = your modern storefront
- Visibility -> Familiarity -> Trust -> Appointments



The Real Reasons Advisors Struggle with Social

- “I don’t have time.”
- “I need to be everywhere.”
- “My clients aren’t on social media.”
- “Compliance makes everything harder.”
- “I posted and nothing happened.”



Strategy



Getting Started with the Social System

Simple 3-part model:

1. Audience – where they spend time and how they engage
2. Cadence – how often you show up
3. Compliance – how to stay compliant



Choose the Right Platform for Your Messaging

Goal	Best Platform
Build local recognition	Facebook
Professional credibility	LinkedIn
Personal brand & visibility	Instagram
Educational short-form content	YouTube/Shorts

Poll

Which platform are you most focused on today?

Facebook

Instagram

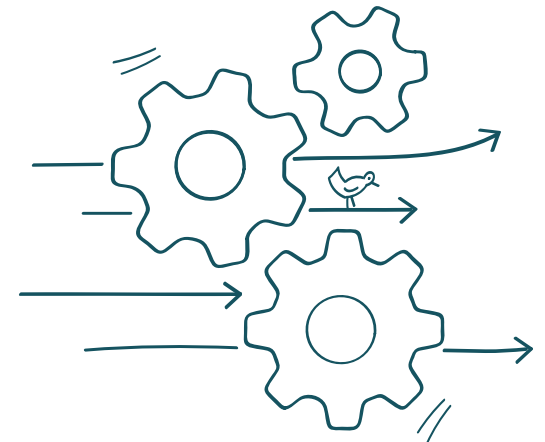
LinkedIn

YouTube

X formerly known as Twitter

Powerful Strategy Considerations

- **Content Syndication**
 - Repurpose one post across channels (turn blog → carousel → short video)
 - Time-saving workflow ideas (e.g. one day per month of batch content)
- **Collaboration & Amplification**
 - Co-post with centers of influence or local businesses.
 - Tag partners, comment on relevant pages — engage, don't just post
- **Tools That Simplify**
 - Scheduling
 - Analytics dashboards
 - Visuals (Canva)



Sourcing Content at Osaic

Osaic Preferred Digital Marketing Tools

- MyCMO (direct & major benefits)
- AdvisorStream (direct & major benefits)

Popular & Impactful Tools

- Fresh Finance
- WealthFeed
- AcquireUp



Where Can I Find Organic Content?

5 Content Inspiration Buckets

1. Client questions
2. Market headlines
3. FAQs from meetings
4. Community involvement
5. Life moments & personal stories

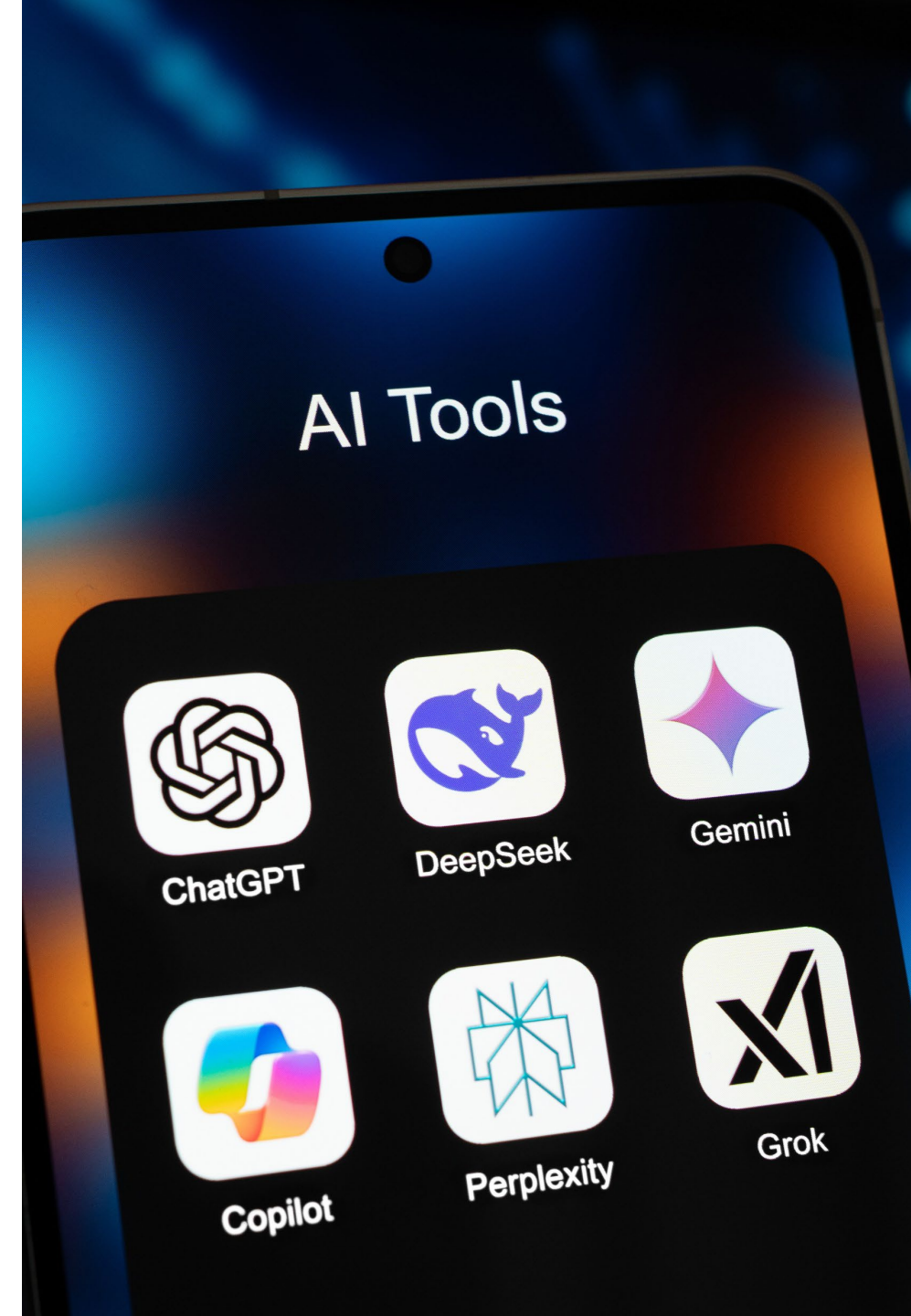


AI Prompts

AI is a brainstorming and efficiency tool — not a replacement for YOUR authentic advisor voice.

Example prompts:

- “Turn this market update into a client-friendly social caption.”
- “Create (2) short form video ideas from this market update.”
- “Rewrite this email into a Facebook post.”



Compliance

The “SAFE” Posting Filter

- **Simple** education
- **Avoid** guarantees
- **Facts** over opinions
- **Evergreen** topics



What FPs Commonly Mistake as Failures

- Low early engagement
- Slow follower growth
- Calibrating a consistent posting cadence
- Comparing themselves to influencers

Setting realistic expectations:

- 30 days = learning
- 90 days = consistency
- 6–12 months = compounding visibility



What Social Platforms Reward

What Social Platforms WANT

- Comments
- Saves
- Shares
- Conversations
- Watch time

Passive vs Active Users	
Passive User	Active User
Posts occasionally	Engages daily
Rarely comments	Builds conversations
Expect reach instantly	Trains algorithm consistently

The 3 Most Important Social Media Habits

1. Stay consistent
2. Stay visible
3. Stay engaged



The 7-Day Social Kickstart Action Plan

Day 1: Choose your platform

Day 2: Identify 3 content themes

Day 3: Draft 3 posts

Day 4: Engage with 10 accounts

Day 5: Schedule 2 posts

Day 6: Review analytics

Day 7: Repeat



The Social Media Experience for Madison & Michigan Financial Companies



What's Working in a Real Advisor Firm:



Q: What mistakes did you make early on?

Q: What changed results the most?

Q: How are you using AI in your workflow?

Q: What tools or shortcuts save you the most time?

Q: What do advisors in your firm value most about having a social presence?



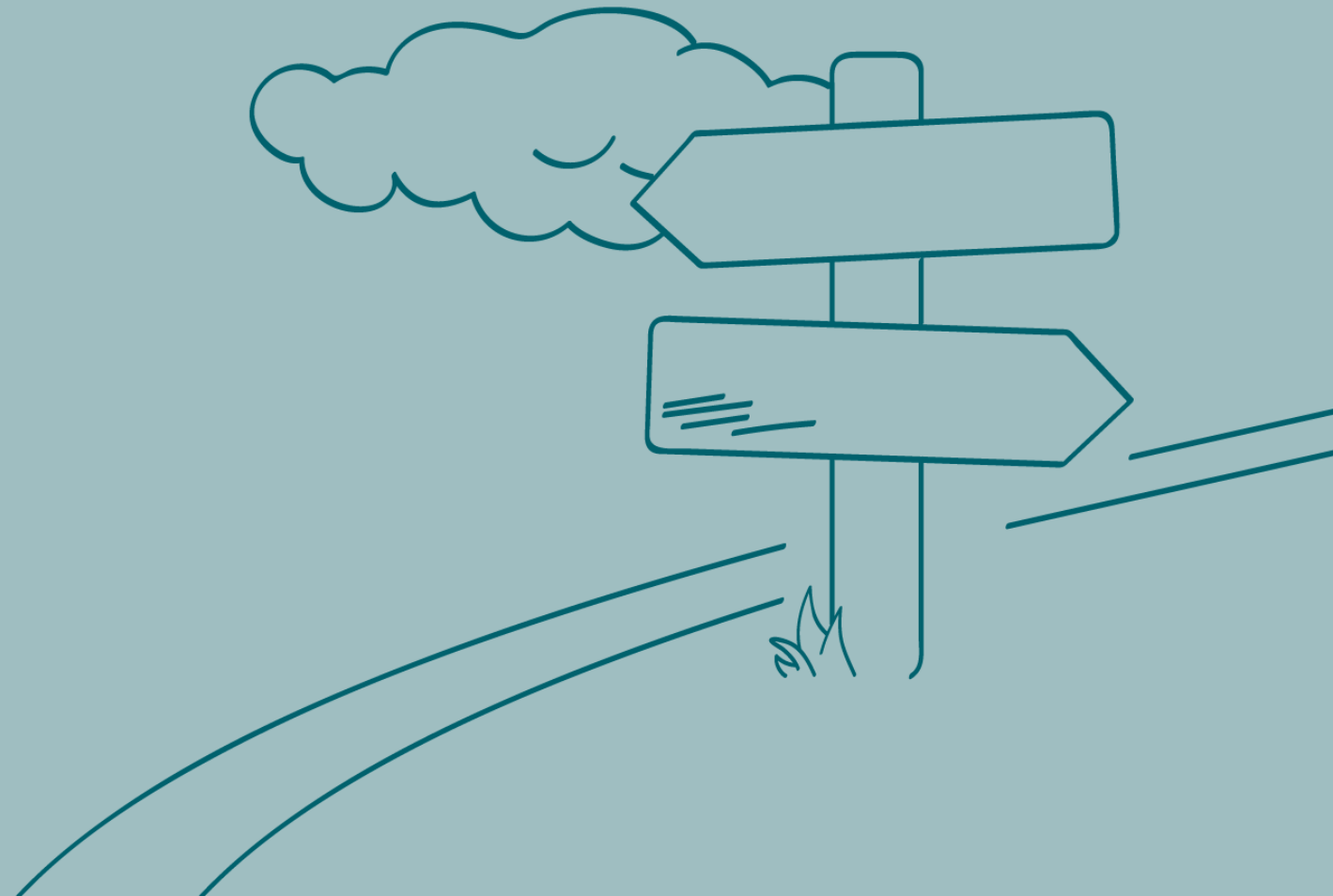


Successful social media isn't about being everywhere or going viral – it's about consistently showing up with relevant, authentic content.

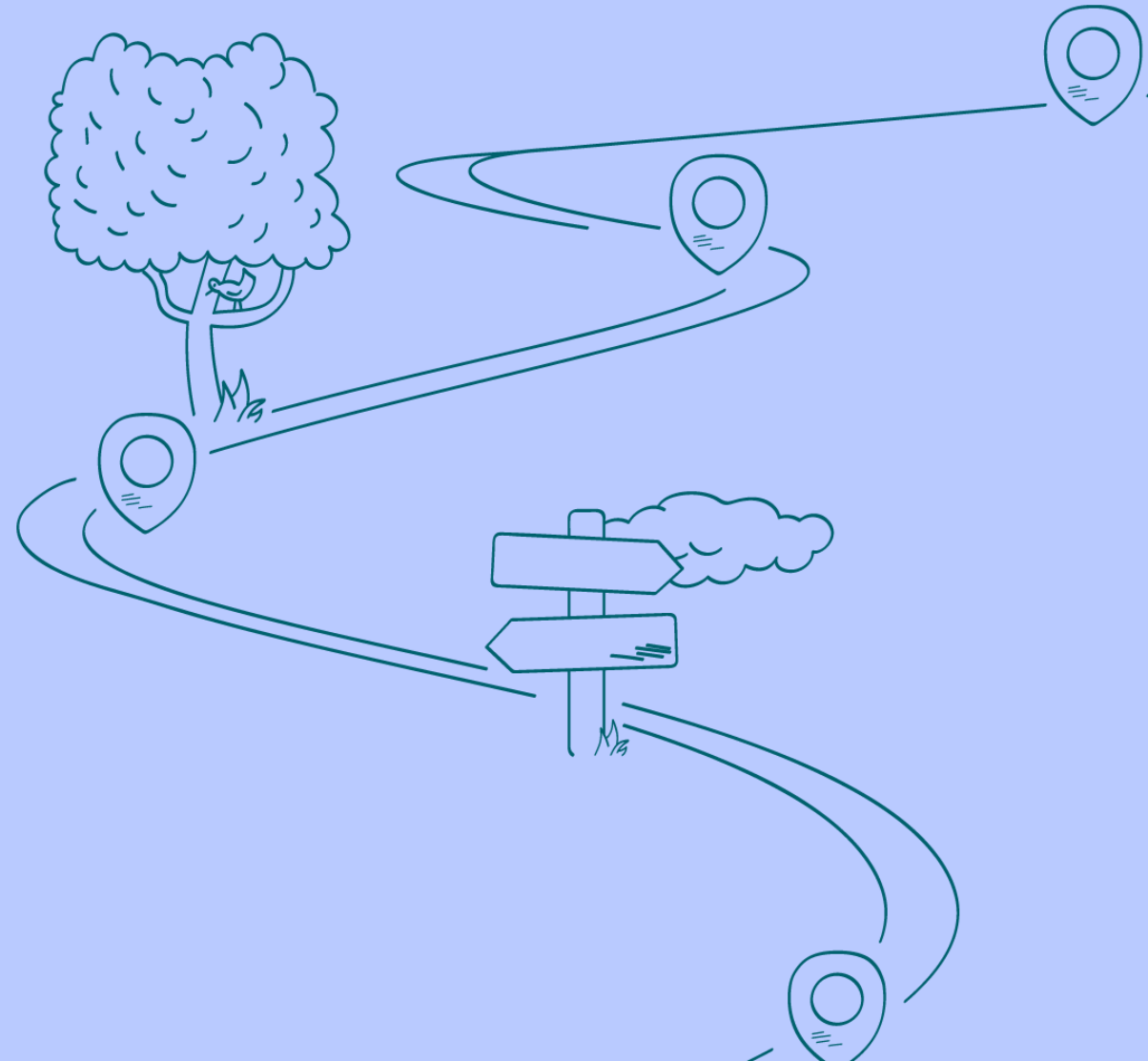
~ Alison & Madison



Questions



Resources



You Will Receive...

- Recording & deck of this session
- Osaic Marketing Resource Center:
<https://osaicmarketing.squarespace.com/>



Wrap-up with Rapid Recall

“What’s your 1 takeaway from today?”

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Empowering Wealth