

# EMAIL MARKETING

Advisor Marketing  
Solutions



## Q4 Priorities Checklist

Use this checklist to help determine your top marketing priorities.

- ☐ **Map Out Year-End Deadlines:** RMDs, contributions, gifting, compliance filings. No scrambling at the end of December.
- ☐ **Deepen Relationships:** Don't just review portfolios. Ask about family changes, career updates, and 2026 goals.
- ☐ **Close the Loop:** Follow up with clients who haven't taken action yet (beneficiaries, risk tolerance, account updates).
- ☐ **Show Up as a Thought Leader:** Publish insights—whether via LinkedIn, a podcast, or your newsletter. Clients remember consistency.
- ☐ **Future-Proof Your Business:** Schedule Your Own Planning Session.  
Decide what services, marketing, or tech upgrades you'll prioritize in 2026.

# Q4 NEWSLETTER TEMPLATE

**SUBJECT LINE: Quarter Four Insights from [Firm Name]**

(Swap in your firm name/logo and send as an email or branded PDF)

## A Year of Shifts, A Quarter of Focus

As 2025 closes, it's about finishing with intention. Markets continue to fluctuate, but your goals and long-term strategy remain constant.

## Year-End Moves Worth Considering

- **Contribution Check:** Retirement, HSA, and 529 plans—are you at your limits?
- **Required Withdrawals:** RMDs must be handled before December 31.
- **Charitable Giving:** Year-end donations and family gifts can support both causes and tax planning.
- **Portfolio Rebalancing:** Adjust allocations, harvest losses, or trim gains to enter 2026 with a balance.

## Looking Into 2026

The start of the year is a natural opportunity for a reset. Considering a big purchase, early retirement steps, or new savings goals? Let's start the planning process now so January begins with clarity.

## A Personal Note

Your financial life is more than numbers. It's about what those numbers enable—peace of mind, family milestones, and future possibilities. Thank you for allowing us to walk alongside you.

Here's to closing the year strong and stepping into 2026 with confidence.

— [Firm Name]

**ADVANCED: ADD IN A QUICK 3-MINUTE VIDEO**

## Additional sections you can add to your newsletter...



### OPTIONAL SIDEBAR #1: CLIENT- FACING

#### Save the Date: Client Appreciation Lunch

We'd love to celebrate the close of the year with you.



November 13, 11:30 a.m. – 1:30 p.m.



[Insert Location]

RSVP to [email/phone]

(Swap this out for holiday hours, office closures, or a note about your annual giving initiative.)



### OPTIONAL SIDEBAR #2: FIRM- FACING GROWTH NOTE

#### What We're Focused on in 2026

We're committed to:

- Expanding client education opportunities
- Strengthening digital tools for easier access
- Growing our team to provide even more personalized service

(Swap this with your firm's specific growth goals, like adding new services, opening a new office, or enhancing client experiences.)

# NEED EXTRA HELP?

BRING YOUR EMAIL MARKETING QUESTIONS TO YOUR FIRST  
FRIDAY COACHING CONSULTATION

## FIRST FRIDAY CONSULTATIONS

- Complimentary 1:1
- 30-minute marketing consultations
- Available the first Friday of each month

