



MyCMO MARKETING PLATFORM

MARKETING MADE EASY WITH THIS AUTOMATED PLATFORM.

What if you had your very own Chief Marketing Officer? MyCMO is just that! MyCMO allows you to execute all of your marketing efforts in a scalable, yet personal way on one, convenient digital hub. Connect with your clients and build deeper relationships with pre-approved emails, social posts, greeting cards, newsletters, turnkey event modules, and more. With MyCMO, you can send the right message to the right people at the right time with just a few clicks!



PRE-APPROVED CONTENT LIBRARY

MyCMO content is authentic and written with your clients in mind. Access a library of email campaigns, social media posts, greeting cards, newsletters, calculators, event kits, videos, and more.



BUILT-IN COMPLIANCE WORKFLOW

Customized and edited content is automatically routed through the built-in compliance workflow for simple, one-step submissions, reviews, and approvals.



MONTHLY MARKET INSIGHTS A LA CARTE

Now you can add on the top performing campaign in Automated Marketing, Monthly Market Insights (MMI). A monthly video newsletter you can truly set and forget, MMI routinely drives high open rates, keeps clients aware of market movements, and ensures you stay top of mind for referrals.



AUTOMATED “SET & FORGET” CAMPAIGNS

Upgrade to MyCMO Automated Marketing campaigns, powered by FMG Suite, to create reliable and memorable touchpoints with your clients, helping to strengthen your relationship. Use “ongoing” campaigns, like Monthly Market Insights, that you can easily set and forget.

Interested in signing up for MyCMO or have questions? Visit www.fmgsuite.com/mycmo

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EVENT KITS

Show your clients how much you appreciate them with an event! Send save the date cards, invitations, social media posts, thank you notes, and more, making it easy to plan, promote, and follow up after your event.



CONTACT MANAGEMENT

Easily manage your clients and prospects using import files that allow you to save time entering new contacts and managing contact groups. MyCMO syncs directly with several CRM systems, including Redtail, SmartOffice, Wealthbox, and more.



CURATOR

Curator finds more content based on your interests. Over time, Curator “learns” your preference and searches for relevant content, adding it to your personalized library. You can use this content to customize your social media and email marketing, making it more authentic and engaging.



PRINTED GREETING CARDS

Add a personal touch to your client communications using printed greeting cards mailed with an actual stamp. Send cards for client birthdays, holidays, milestone moments, thanks or just because!



BUILT-IN COMPLIANCE WORKFLOW

Custom content is automatically routed through the built-in compliance workflow for simple, one-step submission, review, and approval.



MARKETING PERFORMANCE AND OPEN RATES

MyCMO tracks the performance of your marketing program and tells you who’s opening your emails and clicking through. MyCMO actually tells you how well it’s working for you, directly in the platform.

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