



Your Free 2023 Marketing Calendar

January: Finding Purpose, Health & Identity in Retirement

February: Your 2023 Social Security Guide (Free Download)

March: Why I Became a Financial Advisor

April: Do You Know Someone Who Could Use Our Help?

May: The Top Financial Mistakes I See Small Business Owners Make

June: How to Build Equity Compensation Into Your Financial Plan

July: How to Align Your Personal Values With Your Financial Goals

August: What Should You Do About Recent Market Volatility?

September: Tax-Efficient Strategies for Giving to Charity

October: What You Need to Know About Your Medicare Plan

November: 10 Financial Actions to Take Before 2024

December: Take Our 2023 Client Satisfaction Survey