EDITORIAL CALENDAR 2025

(k) RETIREMENT PLAN MARKETING

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Stay top of mind and build trust with prospects, clients, and centers of influence all year long.

Position yourself as an essential resource with a strategy that combines fiduciary education for plan sponsors and participant-focused guidance.

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QUARTER **1**

Retirement Leadership Insights

FIDUCIARY EDUCATION

BLOG ARTICLES

1. What Does a 401(k) Committee Do?
2. 401(k) Committee Changes and Tips to Help New Members
3. Should You Consider Auto-Features for Your Retirement Plan?

NEWSLETTER

Retirement Leadership Insights

PLAN SPONSOR GUIDE

401(k) Playbook for Company Leadership

VIDEO

7 Best Practices for Employee Benefits Committees

SOCIAL CARD

Know Your Retirement Plan Committee

COMPLIANCE REMINDERS

Compliance Calendar & Upcoming Deadlines

EMPLOYEE EDUCATION

ON-DEMAND WEBINAR

Designing Your Future: Manageable Stages for Your Financial Goals

WORKSHEET

Designing Your Future: Organize your financial goals into stages.

DIGITAL COMMUNICATION

DRIP CAMPAIGN

- 12 Value-Add Email Touchpoints
- 11 Thought-leadership Social Posts
- Q1 Sales Email
- 3 Video Scripts

QUARTER **2**

Employee Benefits Trends

BLOG ARTICLES

1. 7 Tips to Help Participants with Long-Term Saving
2. Benchmarking Retirement and Health Insurance Benefits
3. Employee Benefits to Help Motivate Your Workforce

NEWSLETTER

Employee Benefits Trends

PLAN SPONSOR GUIDE

Understanding Student Loan Matching Programs

VIDEO

Employee Benefits that Bridge Generations

SOCIAL CARD

Customized Employee Benefits Solutions

COMPLIANCE REMINDERS

Compliance Calendar & Upcoming Deadlines

ON-DEMAND WEBINAR

Budgeting & Saving: Building Your Wealth

WORKSHEET

Interactive Budgeting Worksheet

DRIP CAMPAIGN

- 10 Value-Add Email Touchpoints
- 9 Thought-leadership Social Posts
- Q2 Sales Email
- 3 Video Scripts

QUARTER **3**

Plan Design Evaluation

FIDUCIARY EDUCATION

BLOG ARTICLES

1. Pros, Cons, and Considerations for Your Plan Provisions
2. Finding the Time to Prepare for Retirement
3. Forfeitures, Missing Participants, and Force Outs

NEWSLETTER

Plan Design Evaluation

PLAN SPONSOR GUIDE

Addressing Retirement Hurdles

VIDEO

Finding Hidden Money

SOCIAL CARD

SECURE ACT Provisions You May Not Have Heard Of

COMPLIANCE REMINDERS

Compliance Calendar & Upcoming Deadlines

EMPLOYEE EDUCATION

ON-DEMAND WEBINAR

How Much Should I Have Saved for Retirement?

WORKSHEET

How Much Should I Have Saved for Retirement?

DIGITAL COMMUNICATION

DRIP CAMPAIGN

- 10 Value-Add Email Touchpoints
- 9 Thought-leadership Social Posts
- Q3 Sales Email
- 3 Video Scripts

QUARTER **4**

Effective Communication Strategies

FIDUCIARY EDUCATION

BLOG ARTICLES

1. Communicating Plan Changes: Keeping Participants Informed
2. Employee Education Deserves a Human Touch
3. Essential Cybersecurity Guidelines for Plan Sponsors

NEWSLETTER

Effective Communication Strategies

PLAN SPONSOR GUIDE

Advanced Tax Strategies

VIDEO

Contingency Planning for Retirement Plans

SOCIAL CARD

Market Volatility Explained

COMPLIANCE REMINDERS

Compliance Calendar & Upcoming Deadlines

EMPLOYEE EDUCATION

ON-DEMAND WEBINAR

Preparing Financially and Emotionally for Retirement

WORKSHEET

Preparing Financially and Emotionally for Retirement

DIGITAL COMMUNICATION

DRIP CAMPAIGN

- 12 Value-Add Email Touchpoints
- 10 Thought-leadership Social Posts
- Q4 Sales Email
- 3 Video Scripts

Attract the right decision makers with an ongoing and scalable process.

- NEWSLETTERS
- INFOGRAPHICS
- EMAIL CAMPAIGNS
- SOCIAL MEDIA
- BLOG ARTICLES
- PRESENTATIONS
- VIDEOS
- *AND* MUCH MORE

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