

## Confirm Design and Contacts



First, you want to make sure your email design and email signature are set up, and then add your contacts to the FMG Database. Pro Tip - it's very helpful to organize your contacts by groups!

- [Adding Signatures](#)
- [Editing Your Design](#)
- [Adding Contacts](#)

## Verify Your Domain



Email domain verification will help prevent your emails from being marked as spam. You can verify your domain in three steps: Email Address Verification, Adding DNS Records, and Confirming DNS Records.

- [Domain Verification](#)

## Build Your Templates



Create and access custom pre-written email templates to edit and fit your brand. If you would like to reuse templates, you can save your edits for future use.

- [Editing Your Design](#)

The more customized your templates are, the better they are for brand recognition. This can be done by editing templates with tones that echo your brand voice.

## Set Up Your Sequences



Email sequences are a great way to nurture client and prospect relationships. With FMG, you can schedule emails and have them sent over time, allowing you to “set it and forget it.”

- [Email Sequences](#)

Stay in touch with your audience and provide relevant information promptly without the stress of manual sending.

## Activate Automation



Consistency is critical to client communications. Email automation allows you to send pre-built campaigns triggered by specific events, allowing you to engage clients during birthdays, holidays, and more.

- [Automated Campaigns](#)

## Prepare Your Newsletters



Build your reputation as a financial expert with informative and entertaining e-newsletters. Delivered automatically on your behalf, these resources simplify complex topics for your audience – from market updates to retirement or estate planning.

- [Market Insights](#)
- [Retirement Insights](#)

## Best Practices

Use the following best practices to plan and customize your emails and get the most out of your marketing.



### Subject Lines

Use your subject lines to hint at the email's contents or raise curiosity to improve open rates.



### Frequency

Most clients are looking for more frequent communication from their advisors. For this reason, we recommend sending emails at least once a week and then adjusting cadence based on performance.



### Personalization

Use FMG's advanced features and the data within your CMS to personalize your emails. Add a name, a photo of the sender, or embed a video. There are a variety of options, and each can make an email feel more like a personal message, improving performance.



### Proofreading

Always double-check communications before sending, ensuring the content is accurate, links function, and a call-to-action has been included if needed.



### Analytics

Draw on your platform's insights to track performance and refine your strategy by doing more of what works and less of what doesn't.

## Ready to Upgrade Your Marketing?

Our award-winning platform makes it easy to build your brand, stay in touch with clients, and grow your business – all from one tool. Curious to learn more? [Schedule some time with our team](#), or give us a call at **858-251-2400**.