



FINANCIAL PLANNING
ASSOCIATION of AUSTRALIA

**FINANCIAL
PLANNING
Week 2017**
21-27 August
Live the Dream

IDEAS FOR CLIENT COMMUNICATION

Here are some ways you can get on board with Financial Planning Week and help spread the word with your clients and prospective clients:

1. Share the social media competition

To celebrate Financial Planning Week, we are running a [social media competition](#), giving consumers a chance to win \$5,000 by telling us in 100 words or less how “\$5,000 will help you #getaplan and bring your dreams to life”. The competition is open until 1 September 2017.

Tip: To give your clients and wider network a chance to enter, share the competition link www.moneyandlife.com.au/competition and the [video teaser and images](#) in this toolkit on your own social media channels and in your client newsletter or email.

2. Share the Live the Dream research report with your clients

As part of the campaign, we conducted some national sentiment research with McCrindle Research. The *Live the Dream* national survey of 2,635 working age Australians delves into the habits, attitudes and beliefs of Australians who feel they’re living their dream. Did you know that those living the dream are three times more likely to seek the advice of a financial planner? This 17-page report is a fascinating read and a great conversation starter with new clients.

Tip: You can access the Live the Dream report [here](#)

3. Send an email to your client database

Financial Planning Week gives you a great reason to get in touch with your database. Here’s some suggest email content:

Tip: Copy and paste the below content into your email system, and tailor it to suit your needs:

Hi {name}

Did you know this week is Financial Planning Week? Every year, the Financial Planning Association (FPA) holds Financial Planning Week, to remind Australians about the importance of financial planning.

The theme for this year is “Live the Dream” and I think it’s a great reminder of why we need a plan in place to realise our biggest dreams. After all, financial planning is not just about numbers

– it’s about deciding what we want out of life, then putting in steps to achieve it. It’s also a nice reminder about the importance of financial independence – whatever life stage we find ourselves at.

The FPA has also launched a social media competition, giving you the chance to **WIN \$5,000** by sharing in 100 words or less how \$5,000 will help you #getaplan and bring your dreams to life. I encourage you to enter the competition and share it on Facebook with your family and friends.

Something you might also find interesting is the Live the Dream research report which has some eye opening insights into the traits, attitudes and behaviours of Australians who feel they are living the dream. The report highlights that one in four Australians believe they are living the dream, and those who are “mostly” or “definitely” living the dream are three times more likely to seek advice from a financial planner.

The report deep dives into how we are going as a nation at living out our dreams and is well worth a read.

You can enter the competition, access the Live the Dream research report and watch some inspiring videos featuring Australians from all walks of life, at www.moneyandlife.com.au/livethedream

Until next time,
{your name}

4. Include a Financial Planning Week segment in your client newsletter

Tip: Tailor this short segment for your client newsletter:

Happy Financial Planning Week!

Every year, the Financial Planning Association (FPA) holds Financial Planning Week, to remind Australians about the importance of financial planning. The theme for this year is *Live the Dream* and I think it’s a great reminder of why we need a plan in place to realise our biggest dreams.

To celebrate Financial Planning Week, the FPA is giving you the chance to **WIN \$5,000** by sharing in 100 words or less how \$5,000 will help you #getaplan and bring your dreams to life. I encourage you to enter the competition and share it on Facebook with your family and friends.

You can enter the competition, access a fascinating *Live the Dream* research report and watch some inspiring videos, at www.moneyandlife.com.au/livethedream

5. Share articles from Money & Life with your clients and prospects

The Money & Life website is the FPA's online destination dedicated to helping Australians improve their financial wellbeing. The site provides articles, practical tips and inspiring real-life stories to help Australians improve their financial wellbeing.

All Money & Life content can be shared with your clients and networks easily. You can share articles and videos via social media using the social media sharing icons, and you can use the snippet tool to share the content in your client newsletter where an email marketing tool is used. You can watch this short Money & Life [explainer video](#) on using the snippet sharing tool to share content from Money & Life.

Tip: Use the Money & Life snippet tool to copy the Financial Planning Week videos and articles into your email system.

Thanks for helping us spread the word! If you have any questions, don't hesitate to contact us at communications@fpa.com.au.
