

Market Volatility Campaign Implementation Guide



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FINANCIAL



Market Volatility Campaign

Campaign Overview

Overview

Market volatility often creates uncertainty, increases client questions, and can lead to reactive decision-making. This campaign is designed to help you guide those conversations with clarity and structure.

The focus is not on predicting market movement. The focus is on helping clients understand how their current plan is positioned and whether it aligns with their goals, timeline, and comfort level.

This campaign provides a repeatable framework to move conversations from reaction to strategy.

Campaign Objective

The objective of this campaign is to:

- Normalize market volatility as part of the investing experience
- Address common behavioral risks during uncertain markets
- Help clients identify gaps in their current strategy
- Create opportunities for proactive planning conversations

The outcome is a more informed client and a more structured advisor-led discussion.



Primary Message

Market volatility is not the problem. Being unprepared for it could be.

Supporting Themes

- Volatility is a normal and expected part of investing
- Emotional decision-making can impact long-term outcomes
- Planning helps reduce the need to react during uncertainty
- Alignment should be reviewed regularly, not just during downturns

Campaign Components And How To Use Them

1. RISK ASSESSMENT QUIZ

Purpose: The quiz is the primary engagement tool used to help clients and prospects evaluate their preparedness for market volatility.

How to use:

- Share in emails, social posts, and meetings
- Use as a starting point for conversations
- Review results together to identify potential gaps

Campaign Components And How To Use Them

2. MEDIA SCRIPTS | RADIO, TV, DIGITAL

Purpose: Introduce key concepts such as risk alignment, behavioral decision-making, and planning.

How to use:

- Use consistently across channels
- Direct all calls to action to the quiz
- Reinforce messaging around alignment and review

Campaign Components And How To Use Them

3. TIMELY ARTICLES

Purpose: Connect current market conditions to planning conversations without making predictions.

How to use:

- Share in email campaigns and newsletters
- Reference during client conversations
- Use to maintain ongoing engagement

Campaign Components And How To Use Them

4. VIDEO CONTENT

Purpose: Provide short, advisor-led explanations that simplify complex topics and build trust.

How to use:

- Record short responses to common client questions
- Share on social platforms and email
- Reinforce consistency in messaging

Implementation Steps

1. CREATE AWARENESS:

Use current market conditions as an entry point. Reference topics such as interest rates, inflation, and market movement to establish relevance.

The objective is to connect with what clients are already seeing and hearing.

Implementation Steps

2. SHIFT TO ALIGNMENT:

Move the conversation away from market performance and toward positioning.

Use questions such as:

- Would you structure your portfolio the same way today?
- Has your current allocation been reviewed recently?

Implementation Steps

3. INTRODUCE THE QUIZ:

Position the quiz as a simple, low-pressure first step.
Explain that it is designed to help identify how their plan may respond during market swings.

Implementation Steps

4. REINFORCE THROUGH CONTENT:

Use articles, videos, and short-form content to stay consistent and visible.
Focus on education, not prediction.

Implementation Steps

5. CONDUCT A PLANNING CONVERSATION:

Use engagement as an opportunity to review:

- Risk exposure
- Income strategy
- Withdrawal approach
- Diversification and positioning

The goal is to ensure alignment, not to make reactive changes.

Suggested Timeline

Weeks 1 to 2

- Launch quiz and landing page
- Begin email and social distribution

Weeks 3 to 6

- Continue content distribution
- Share timely articles and videos
- Run media scripts

Ongoing

- Incorporate quiz into client reviews
- Use materials in prospect conversations

Compliance Notes

- Avoid making market predictions
- Do not imply guaranteed outcomes
- Focus on education and planning
- Use balanced and appropriate language when discussing risk

Client Conversation Guide

Opening the Conversation

Start by acknowledging what clients are experiencing without reinforcing fear.

Example:

Many clients are asking questions about recent market movement. What has been on your mind lately?

Client Conversation Guide

Reframing the Situation

Help clients understand that volatility is normal.

Key Points:

- Market declines occur regularly
- Volatility is part of long-term investing
- The focus should remain on the plan

Identifying Gaps

Ask questions that uncover uncertainty:

- How confident do you feel about your current strategy?
- Have you reviewed your risk level recently?
- Do you have a plan for income during market declines?



Introducing The Quiz

Position the quiz as a helpful tool:

This is a quick way to evaluate how your plan may respond during market swings.

Transition To Planning

Focus on alignment areas:

- Risk exposure
- Income strategy
- Withdrawal approach
- Diversification

Volatility Checklist | Client Facing

Are You Prepared for Market Volatility?

- I understand my current level of risk
- I have a plan for income during market declines
- I review my strategy regularly
- I would not feel pressured to make sudden decisions
- I understand how volatility impacts my long-term goals

If several of these are unclear, it may be time for a review.

Email Campaign | 6 Touchpoints

EMAIL 1: MARKET AWARENESS

Subject: Markets Are Moving. What Should You Do?
Introduce volatility and normalize it.

EMAIL 2: EMOTIONAL DECISIONS

Subject: The Cost of Reacting at the Wrong Time
Focus on behavior.

EMAIL 3: RISK ALIGNMENT

Subject: Would You Build Your Portfolio the Same Way Today?
Introduce alignment concept.

Email Campaign | 6 Touchpoints

EMAIL 4: INCOME PLANNING

Subject: How Income Strategy Impacts Volatility
Explain stability concepts.

EMAIL 5: HIDDEN RISK

Subject: What Strong Markets May Be Hiding
Discuss risk drift.

EMAIL 6: CALL TO ACTION

Subject: Are You Prepared for the Next Market Drop?
Drive to quiz and meeting.

