Wealth Navigator

30 (not boring) post templates

FOR FINANCIAL ADVISORS

One post per day for 30 days. Fill in the blanks with your own stories, your own clients, your own words.

getwealthnavigator.com

You do not have a content problem. You have a blank-page problem.

Each template takes 10 to 15 minutes. Drop in your own stories, your own clients, your own words. Do not polish them to death. The less it reads like a brochure, the better it performs.

Before you start, write down the three lessons you most want every client to understand. You will reuse them all month. Content is not about saying new things. It is about saying the same things in different ways.

> **The month follows a ladder.**
>
> Week 1 gets you seen by strangers.
>
> Week 2 names the problems they did not know were costing them.
>
> Week 3 shows them the problems are solvable.
>
> Week 4 shows them why the solution might be you.
>
> Every prospect is on that ladder somewhere; this month walks all of them one rung up.

WEEK 1

Get seen, get human

For the people who do not know you yet. The only goal is to be seen and to be a person.

Day 1

The catalyst story

Why you really do this work.

THE SKELETON

People ask why I became an advisor. The honest answer is [the real moment in your past involving money]. [2 to 4 short lines telling that moment.] That is why I do this work today for [who you help].

EXAMPLE OPENING

“People ask why I became an advisor. The honest answer is watching my parents argue about money at the kitchen table every Sunday.”

WHY IT WORKS

Your credentials are a resume. The worst part of your story is the best part of your pitch.

Day 2

The unpolished take

One honest opinion, written like a text.

THE SKELETON

[A sentence you believe about money that sounds slightly wrong until explained.] [2 to 4 rough lines explaining. No smoothing.] [One question to the reader.]

EXAMPLE OPENING

“Most 'diversified' portfolios I review are the same fund bought five different ways.”

WHY IT WORKS

The algorithm is people. A less polished version of you gives them more to connect with.

Day 3

The desk post

What you are actually working on this week.

THE SKELETON

This week I am [real, ordinary piece of the job: reviewing estate documents, prepping a retirement projection]. [2 lines on what most people would be surprised to learn about it.]

EXAMPLE OPENING

"Spent the morning reading a 40-page pension buyout offer so my client does not have to."

WHY IT WORKS

Doing your job in public is the trust signal researchers look for before they ever talk to you.

Day 4

The core lesson, applied

Your workhorse. One of your three lessons, new context.

THE SKELETON

[Core lesson, one sentence.] Here is what that looks like in real life: [a situation your clients face]. [3 to 5 lines walking it through.] The lesson does not change. The situation does.

EXAMPLE OPENING

"Spend less than you earn. Boring advice, until the layoff email lands."

WHY IT WORKS

Dave Ramsey has run three decades on three ideas. Teacher, not reporter.

Day 5

The question post

Ask, do not tell.

THE SKELETON

Genuine question for [your niche]: [a question about how they think or feel about a money topic, in their words, not yours]. [One line on why you are asking.]

EXAMPLE OPENING

“Genuine question for business owners: when you picture selling one day, what worries you more, the price or what comes after?”

WHY IT WORKS

Their answers hand you next month's content in their exact words, and comments beat likes.

Day 6

The three things

Plant your flag.

THE SKELETON

After [X] years in this industry, I keep coming back to three things: 1. [lesson one] 2. [lesson two] 3. [lesson three]. Everything else is detail.

EXAMPLE OPENING

"After 20 years in this industry, I keep coming back to three things."

WHY IT WORKS

This is the post you will point back to all month. Pick your three things, repeat them forever.

Day 7

The giveaway, round one

A complete checklist, free.

THE SKELETON

Here is the exact [checklist / question list] I use with clients to [job it does]. Free. [The actual thing, 5 to 8 numbered lines. Hold nothing back.] No catch.

EXAMPLE OPENING

“Here is the exact 5-question checkup I run on every new client's estate documents. Free.”

WHY IT WORKS

People who screen calls and research everything trust free samples, and they still do not have your skill set.

WEEK 2

Name their problem

For the people who do not realize their current way is costing them. Show the cracks kindly.

Day 8

The trigger moment

Meet them when life moves.

THE SKELETON

A [job change / retirement / business sale / inheritance] is not just a life event. It is a [30 / 60 / 90] day window where [what gets decided]. [3 lines on what people usually miss.] Questions worth asking in that window: [2 or 3 plain questions].

EXAMPLE OPENING

"A retirement date is not just a party. It is a 90-day window where a decade of tax outcomes gets decided."

WHY IT WORKS

The moment life shifts is the moment a message stops being an interruption. This post finds people in that moment.

Day 9

The mistake you keep seeing

The kind correction.

THE SKELETON

The most expensive mistake I keep seeing [niche] make: [mistake, one sentence]. It usually looks like this: [2 to 3 innocent-looking lines]. The fix is not complicated: [the principle, not the product].

EXAMPLE OPENING

"The most expensive mistake I keep seeing pre-retirees make: treating the retirement date as a finish line instead of a starting gun."

WHY IT WORKS

Rotation three of your core lessons. A story one week, a mistake the next. Same ideas, never the same post.

Day 10

The cost of doing nothing

The invisible bill.

THE SKELETON

'We will sort it out later' has a price. For [situation], later usually costs [the kind of cost: options lost, taxes locked in, stress moved to a spouse]. [2 lines on why it feels free today.]

EXAMPLE OPENING

"'We will update the will after the summer' is the most expensive sentence I hear."

WHY IT WORKS

Problem-aware posts show the crack in the current approach. Nothing cracks louder than the default.

Day 11

The symptom post

Make them recognize themselves.

THE SKELETON

If [relatable symptom: statements you do not open, a drawer of old pension letters, three advisors who have never spoken], you do not have a [what they think] problem. You have a [what it actually is] problem.

EXAMPLE OPENING

“If your accountant and your advisor have never once spoken, you do not have a paperwork problem.”

WHY IT WORKS

99.1 percent of prospects do not care about info posts. Your only job is to make them feel understood.

Day 12

The client story

What they thought vs what it was.

THE SKELETON

[Anonymized situation: role, life stage, the problem in their words. No names, no identifying details.] What they thought the problem was: [their words]. What it actually was: [what you found]. [2 lines on what changed once it was named. Process, never outcomes.]

EXAMPLE OPENING

“A couple came in convinced they had an investing problem. Ten minutes in, it was a 'nobody has looked at the whole picture' problem.”

WHY IT WORKS

Stories are how strangers recognize themselves. Info teaches; stories convert.

Day 13

The myth flip

Sounds right, costs money.

THE SKELETON

'[Common belief in your niche]' sounds right. Here is what it misses: [2 to 4 lines]. What tends to serve people better: [the principle].

EXAMPLE OPENING

“'I will just work a few more years' sounds like a plan. It is usually a postponed decision wearing a plan's clothes.”

WHY IT WORKS

Confirming a suspicion they already half-hold is the fastest trust you can build.

Day 14

The giveaway, round two

The self-diagnosis.

THE SKELETON

Score yourself. [5 to 7 yes/no questions that reveal the problem you named all week.] [One line: what mostly-no answers usually means.] No catch.

EXAMPLE OPENING

“Seven questions that tell you whether your retirement plan is a plan or a hope. Score yourself.”

WHY IT WORKS

A self-audit is a giveaway and a mirror at once. They diagnose themselves; you never had to pitch.

WEEK 3

Show it gets solved

For the people who now see the problem. Prove a fix exists. Not your fix yet, just a fix.

Day 15

The walkthrough

How this kind of problem gets solved, start to finish.

THE SKELETON

How [problem from week 2] actually gets solved: Step 1: [plain step]. Step 2: [plain step]. Step 3: [plain step]. None of this is magic. It is just rarely done in order.

EXAMPLE OPENING

"How a messy retirement picture actually gets sorted, in three steps."

WHY IT WORKS

Solution-aware posts show the problem is solvable. Hope is a prerequisite for action.

Day 16

The state change

Before and after, feelings not figures.

THE SKELETON

[Anonymized client] arrived with [the before state: drawer of statements, three uncoordinated accounts, sleepless spouse]. Six months later: [the after state: one picture, one plan, named decisions]. Nothing exotic happened. [One line on what actually made the difference.]

EXAMPLE OPENING

"She arrived with eleven accounts at four institutions and no idea what any of it was for."

WHY IT WORKS

A state change is proof without a performance promise. Compliance-safe, human, believable.

Day 17

The plain-words explainer

Close the knowledge gap.

THE SKELETON

[Term your clients pretend to understand], in plain words: [3 to 5 lines, no jargon, one analogy]. Why it matters to you: [one line].

EXAMPLE OPENING

"'Probate', in plain words: the government checking your homework after you are gone."

WHY IT WORKS

There is an information surplus and a knowledge gap. Reliable translation is rare, and rare gets followed.

Day 18

The anatomy post

What a good one actually includes.

THE SKELETON

What a real [financial plan / estate review / retirement projection] includes: [5 to 7 bullet components, plain words]. If yours is missing [the most-missed one], it is not finished.

EXAMPLE OPENING

“What a real financial plan includes, and no, it is not a binder of fund charts.”

WHY IT WORKS

Giving away the standard makes you the standard-setter.

Day 19

The neutral comparison

Option A vs option B, no thumb on the scale.

THE SKELETON

[Option A] vs [option B]: A is better when [situations]. B is better when [situations]. The honest answer: it depends on [the deciding factor most people skip].

EXAMPLE OPENING

"Paying off the mortgage vs investing the difference. The honest answer is less exciting than either camp admits."

WHY IT WORKS

Neutrality reads as confidence. Salespeople pick sides; advisors weigh them.

Day 20

The buying criteria

How to choose any advisor, including not you.

THE SKELETON

Questions to ask any advisor before you sign, including me: [5 questions that expose quality]. If the answers are vague, keep looking.

EXAMPLE OPENING

"Five questions to ask any advisor before you sign anything. Including me."

WHY IT WORKS

Handing over the buying criteria is the deepest giveaway. Only someone confident in their answers would publish the test.

Day 21

The giveaway, round three

The full framework.

THE SKELETON

The exact framework I use to [solve the week's problem]: [the whole thing, 5 to 8 numbered steps]. All of it. If you want help applying it, you know where I am.

EXAMPLE OPENING

“The exact order I review a new client's finances in, and why the order matters more than the products.”

WHY IT WORKS

Give the whole framework away. They will still need your hands.

WEEK 4

Earn the call

For the people who believe the problem is real and solvable. Now, why you.

Day 22

How I actually work

The process, demystified.

THE SKELETON

What working with me actually looks like: [step-by-step from first call to ongoing rhythm, 4 to 6 plain lines]. No surprises is the point.

EXAMPLE OPENING

"What actually happens after someone books a first call with me. Step by step, no mystery."

WHY IT WORKS

Fear of the unknown blocks more calls than fees do. Transparency kills the fear where it lives.

Day 23

Who I am not for

The disqualifier.

THE SKELETON

I am probably not the right advisor if [2 or 3 honest disqualifiers]. I am probably right if [2 or 3 qualifiers in their words].

EXAMPLE OPENING

"I am probably not your advisor if you want someone to beat the market. Nobody honest is."

WHY IT WORKS

Fence sitters do not buy. An edge repels the wrong people and magnetizes the right ones.

Day 24

The first call, unveiled

What happens, what does not.

THE SKELETON

What a first call with me is: [what you actually cover]. What it is not: [no pitch, no products, no homework]. [One line on what they leave with either way.]

EXAMPLE OPENING

"A first call with me is thirty minutes of questions about your picture. Here is exactly what it is not."

WHY IT WORKS

Naming the no-pitch rule out loud is the strongest fear-killer for people who hate being sold to.

Day 25

The silent objection

Answer what they are thinking.

THE SKELETON

'[The objection nobody says out loud: I should have sorted this years ago / my situation is too messy / advisors are for rich people].' [3 to 4 lines taking it seriously and dissolving it, no scolding.]

EXAMPLE OPENING

“'I should have done this ten years ago.' Maybe. And the second-best time is a Tuesday like this one.”

WHY IT WORKS

Justify their failures. The reader who feels forgiven is the reader who books.

Day 26

Why I do it this way

Your angle vs the standard.

THE SKELETON

Most of the industry does [the standard way]. I do [your way] instead. Not because it is fancier, but because [the reason grounded in client outcomes of process, not performance].

EXAMPLE OPENING

“Most reviews start with the portfolio. Mine start with the calendar: what has to happen, and by when.”

WHY IT WORKS

Product-aware readers are comparing you to every other advisor. Give them a difference they can repeat to a spouse.

Day 27

Proof of work

Show the doing.

THE SKELETON

[A real artifact of your work this week: the 12 documents reviewed, the checklist run, the coordination call made. Screenshot-able if compliant.] [One line: this is what the fee actually buys.]

EXAMPLE OPENING

“Fourteen pages of pension fine print, three highlighters, one clear recommendation. Tuesday.”

WHY IT WORKS

Evidence of effort is proof no regulator objects to. It shows the job being done, not outcomes being promised.

Day 28

The giveaway, round four, with a door

Full value plus a soft invitation.

THE SKELETON

[One more complete, useful thing: template, question list, checklist.] All yours. And if reading it makes you think 'I would rather someone just did this with me', that is literally the job. [Booking line.]

EXAMPLE OPENING

“My year-end money checklist, all of it. And if you would rather walk it through together, that is what first calls are for.”

WHY IT WORKS

Three weeks of giving makes one soft ask feel fair. It is their idea to book by now, which is the whole point.

DAYS 29 + 30

Keep the engine running

Consistency itself becomes content. Close the month, then start the next one.

Day 29

The recap

The month in one post.

THE SKELETON

30 days of posting, one honest summary: the three things I keep coming back to are still [your three lessons]. The post that resonated most was [which and why you think so]. [One line thanking the people who replied.]

EXAMPLE OPENING

"A month of posting later, the same three ideas keep winning."

WHY IT WORKS

Repetition with reflection. Your followers caught a fraction of the month; the recap is new to most of them.

Day 30

The restart

What 30 days taught you.

THE SKELETON

What I learned posting every day for a month: [2 or 3 honest observations, including an awkward one]. Doing it again next month, because [reason in your voice]. What should I write about? [Ask.]

EXAMPLE OPENING

"I posted every day for a month. The awkward truth: my least polished post did the best."

WHY IT WORKS

You got bored of your content before anyone noticed it. The restart post turns consistency itself into content, and the ask refills your topic list.

Before you post: the compliance page

These templates are structures, not scripts. Before posting anything: no performance promises, no projected returns, no guarantees, no client testimonials where your regulator restricts them, and nothing that constitutes personal financial advice.

Client stories must be anonymized beyond recognition. Your firm's review process applies to everything you publish. When in doubt, your compliance team wins.

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