30-Day Compliant Social Content Calendar

A sample month — educational, on-brand, and built for SEC-regulated marketing. Every post repurposes assets you *already own* (The Texas Wealth Report, *Retire With Impact!*, your media features).

How this stays compliant (SEC Marketing Rule & Rule 204-2): Every item is **educational only** — no performance, return, or personalized-advice claims. Any client comment/review is handled with required disclosures & moderation. **Every post is pre-approved** by your CCO/Foundations before publishing and **auto-archived** (time-stamped) for recordkeeping.
✔ approve → post → archive

Week 1 — Retirement Income Foundations

DAY	PLATFORM	FORMAT	TOPIC / HOOK (EDUCATIONAL)	REPURPOSED FROM
1 · Mon	**LinkedIn**	Text + graphic	"The 4 questions every pre-retiree should answer before they stop working." (intro to your Blueprint™, framed as education)	*Retire With Impact! — Ch.1*
2 · Tue	**Facebook / IG**	Reel (60s)	"What is a retirement 'income floor'?" — Summer explains the concept in plain English	*TWR episode clip*
3 · Wed	**Instagram**	Carousel (5 slides)	"3 income sources most people forget to plan around" (pension, Social Security timing, RMDs)	*Book + blog*
4 · Thu	**YouTube Short**	Vertical clip	"Sequence-of-returns risk — why WHEN you retire matters" (education, no market calls)	*TWR episode clip*
5 · Fri	**Facebook**	Single graphic	"Friday Fundamentals": one plain-language term defined (e.g., "fiduciary — what it means for you")	*Original / brand*
6 · Sat	**Instagram Story**	Poll / question	"Which worries you most in retirement?" (running out of money / taxes / healthcare) — engagement	*Original*
7 · Sun	**LinkedIn**	Story/Note	"Sunday reflection": Summer's mission — helping families retire with confidence (brand/human)	*About page / interview*

Week 2 — Tax-Smart Retirement

DAY	PLATFORM	FORMAT	TOPIC / HOOK (EDUCATIONAL)	REPURPOSED FROM
8 · Mon	**LinkedIn**	Article	"Roth conversions: the 'why' in plain English" (concept + who it's a conversation for — not advice)	*TWR episode + book*
9 · Tue	**Facebook / IG**	Reel (45s)	"The tax time-bomb in your 401(k)" — Summer explains tax-deferred vs. tax-free	*TWR episode clip*
10 · Wed	**Instagram**	Carousel	"3 tax buckets everyone should understand" (taxable / tax-deferred / tax-free)	*Book*
11 · Thu	**YouTube Short**	Vertical clip	"What is an RMD and when does it hit?" (education)	*TWR episode clip*
12 · Fri	**Facebook**	Single graphic	"Friday Fundamentals": "tax diversification" defined	*Original / brand*
13 · Sat	**Instagram Story**	Q&A sticker	"Ask Summer": collect general retirement questions (answered generally, compliance-reviewed)	*Original*
14 · Sun	**LinkedIn**	Media feature	Share a past CBS/Fox/KPRC appearance clip — "as seen on" credibility (factual)	*Media library*

Week 3 — Protecting What You've Built

DAY	PLATFORM	FORMAT	TOPIC / HOOK (EDUCATIONAL)	REPURPOSED FROM
15 · Mon	**LinkedIn**	Text + graphic	"Medicare's 3 big decisions — and the deadlines that cost people money"	*TWR episode + blog*
16 · Tue	**Facebook / IG**	Reel (60s)	"Long-term care: the risk nobody wants to talk about" (education, options overview)	*TWR episode clip*
17 · Wed	**Instagram**	Carousel	"5 documents every family should have" (will, POA, healthcare directive, beneficiaries, trust convo)	*Book / estate topic*
18 · Thu	**YouTube Short**	Vertical clip	"Why beneficiary forms beat your will" (common, costly mistake — education)	*TWR episode clip*
19 · Fri	**Facebook**	Single graphic	"Friday Fundamentals": "estate vs. legacy — the difference"	*Brand / book*
20 · Sat	**Instagram Story**	Poll	"Do you have an updated beneficiary on every account?" (yes/no) — engagement + education	*Original*
21 · Sun	**LinkedIn**	Human/brand	"Women & wealth": Summer's perspective as a female fiduciary CEO (thought leadership)	*Interviews (Voyage/Houstonia)*

Week 4 — Timing, Legacy & Next Steps

DAY	PLATFORM	FORMAT	TOPIC / HOOK (EDUCATIONAL)	REPURPOSED FROM
22 · Mon	**LinkedIn**	Article	"Social Security: 62 vs. 67 vs. 70 — the tradeoffs" (education, no one-size advice)	*TWR episode + book*
23 · Tue	**Facebook / IG**	Reel (45s)	"The #1 question to ask before claiming Social Security" — Summer	*TWR episode clip*
24 · Wed	**Instagram**	Carousel	"What a retirement 'stress test' looks like" (walk through the concept)	*Blueprint™ / book*
25 · Thu	**YouTube Short**	Vertical clip	"Inflation & your 30-year retirement" (education on planning for it)	*TWR episode clip*
26 · Fri	**Facebook**	Book feature	"Free chapter" of *Retire With Impact!* — lead magnet (already on site)	*Book download*
27 · Sat	**Instagram**	Behind-the-scenes	Team/office snapshot — humanize the firm (no claims)	*Original photo*
28 · Sun	**LinkedIn**	Recap	"This month on The Texas Wealth Report" — episode roundup driving to YouTube	*TWR channel*
29 · Mon	**All platforms**	Event promo	Upcoming educational seminar/webinar registration (compliant event invite)	*Seminar system*
30 · Tue	**Facebook / IG**	Soft CTA reel	"Have a question about your retirement? Book a no-cost 15-min conversation." (book link — no promises)	*HubSpot scheduler*

Cadence: ~1 post/day, mixed formats, 5 platforms. **~8–10 of these are short video reels** cut from existing Texas Wealth Report episodes — a month of content from footage you already produced.

Every item: educational only · pre-approved by compliance · auto-archived for Rule 204-2 · comments moderated for testimonial rules.