# 90-Day Social Media Pilot

A compliant, done-for-you social & content engine — built for SEC-regulated firms

You already have the hard part: a TV show, a book, media features, and a story people trust. What's missing is a **consistent, compliant system** that turns all of it into steady growth online — without adding a single ounce of compliance risk. This 90-day pilot proves we can do exactly that, with clear metrics and zero long-term commitment.

## What's included — every month

- ✔ **~20 posts/month** across LinkedIn, Facebook, Instagram & YouTube
- ✔ **8–10 short-form reels** cut from your Texas Wealth Report episodes
- ✔ AI-drafted educational content — **reviewed & compliance-approved** before posting
- ✔ Consistent, on-brand publishing calendar
- ✔ **Every post & comment archived** & time-stamped (Rule 204-2)
- ✔ Comment monitoring & moderation (testimonial-rule safe)
- ✔ Monthly performance report — plain-English
- ✔ A dedicated point of contact (not a call center)

## How the 90 days work

1. **Weeks 1–2 — Foundation.** Audit your current social, set up the compliance pre-approval + archiving workflow with your team, define content pillars, and cut the first batch of reels from your episode library.
2. **Weeks 3–10 — Production & Publishing.** Consistent daily posting across platforms, reels rolling out, every piece approved and archived, comments moderated and engaged.
3. **Weeks 11–13 — Measure & Optimize.** Full results report, refine what's working, and present a go-forward roadmap.

## How we measure success

We commit to **consistent, compliant output** and **transparent monthly reporting** on the metrics we *can* move: **reach & impressions, engagement rate, follower growth, and booked consultations from social.**

**Our honest promise:** we grow the top of your funnel and prove it with numbers. We do **not** guarantee closed clients — that depends on your advisors and your process — and we won't make claims we can't substantiate. That straight talk is exactly how a regulated firm should be marketed.

## Compliance is built in — not bolted on

- ✔ **Nothing publishes without your approval** — every item routes to your CCO / Foundations first
- ✔ **Everything archived** — posts, edits, and comments captured & time-stamped for Rule 204-2 recordkeeping
- ✔ **Testimonial & review disclosures** handled per the SEC Marketing Rule
- ✔ **Educational only** — no performance, return, or personalized-advice claims
- ✔ **AI used honestly** — substantiated, never overstated (the SEC now fines "AI-washing")

## Your investment

| ITEM | INVESTMENT |
|---|---|
| **90-Day Pilot** — full engine above, month-to-month, no long-term contract | **$3,500/mo** |
| Content Library Jumpstart (first reels cut from your back-catalog) | **Included** |
| After the pilot | Continue month-to-month |

For comparison, one **in-house** web/social employee runs roughly **$90K–$100K all-in** per year (salary + payroll taxes + benefits + PTO + overhead) — about **$8,000/month**. This pilot delivers a *whole team and system* for **well under half that** — and you can walk away any month.

## What we'd need from you

- ✔ Access to (or admin on) your social accounts
- ✔ A quick intro to your compliance contact (CCO / Foundations) to set up the approval workflow
- ✔ Your episode library & brand assets (logos, colors, headshots)
- ✔ One 30-minute kickoff call

## Next steps

1. **Approve the pilot** — a simple yes gets us going.
2. **Kickoff call** — 30 minutes to align.
3. **Live in ~2 weeks** — first reels out the door.


IAM Pro AI provides marketing & content services and is **not** the firm's compliance or legal advisor. All content is subject to Impact! Partners Financial's and Foundations Investment Advisors' compliance approval. Marketing results are not guaranteed; we commit to defined output and transparent reporting. Proposal valid 30 days.