



2024 FINANCIAL ADVISOR MARKETING, SOCIAL MEDIA, AND CLIENT CULTIVATION CALENDAR

January	February
<p>1 – New Year’s Day 9 – National Law Enforcement Appreciation Day 12 – National Pharmacist Day 13 – Korean American Day 15 – Martin Luther King, Jr. Day 28 – Data Privacy Day</p>	<p>1 – Black History Month 1 – College Financial Aid Awareness Month 2 – National Wear Red Day for Heart Disease 4 – World Cancer Day 9 – National Pizza Day 10 – Chinese New Year (Changes Annually) 11 – International Day of Women and Girls in Science 11 – Super Bowl Sunday 13 – Mardi Gras (Changes Annually) 14 – Valentine’s Day 15 – International Childhood Cancer Day 16 – National Caregivers’ Day 19 – President’s Day</p>
<p>SUGGESTED FINANCIAL COMMUNICATIONS</p> <ul style="list-style-type: none"> • Send Happy New Year’s cards to your clients and centers of influence. • Letter to clients on 2024 Practice Announcements (i.e., new staff, new technology, new DBA). • Letter to clients to reach out for any investment or insurance tax documents needed. 	<p>SUGGESTED FINANCIAL COMMUNICATIONS</p> <ul style="list-style-type: none"> • Send cards or call widow/widower clients to wish them a Happy Valentine’s Day. • College Education Funding Campaigns / College FAFSA Application • Financial and Wellness Concepts for Caregivers

March	April
<p>1 – Women’s History Month 1 – Employee Appreciation Day (First Friday) 3 – World Wildlife Day 6 – National Dentists’ Day 8 – International Women’s Day 10 – Daylight Savings Time (Set Clocks Ahead) 11 – World Plumbing Day 17 – Saint Patrick’s Day 21 – World Down Syndrome Day 30 – National Doctors’ Day 31 – Transgender Day of Visibility 31 – Easter Sunday</p>	<p>1 – National Social Security Month 2 – World Autism Awareness 8-12 – America Saves Week 8-12 – National Dental Hygienists’ Week (2nd week April) 10 – National Siblings’ Day 18 – Tax Day 20 – Husband Appreciation Day 22 – Passover 22 – Earth Day 24 – Administrative Professionals’ Day (lunch/send flowers/gift cards) 25 – Take Your Daughters and Sons to Work Day 28 – National Small Business Week (ends May 4th)</p>
<p>SUGGESTED FINANCIAL COMMUNICATIONS</p> <ul style="list-style-type: none"> Plan a Client Educational Seminar for April Social Security Month (i.e., Healthcare and Medicare in Retirement/Social Security). Financial Planning Strategies for Women 	<p>SUGGESTED FINANCIAL COMMUNICATIONS</p> <ul style="list-style-type: none"> CPA “Take a Break” Coffee Gift Cards – send your CPAs/Enrolled Agents a gift card for the home stretch of tax season. Tax Planning/Tax-Loss Harvesting Concepts Personal Saving, Social Security, and Small Business Planning Concepts
May	June
<p>1 – Asian American and Pacific Islander Heritage Month 1 – Disability Insurance Awareness Month 1 – School Principals’ Day 4 – International Firefighters’ Day 5 – Cinco de Mayo 6 – National Nurses’ Day 7 – National Teachers’ Day 8 – National Receptionists’ Day 12 – Mothers’ Day 20 – National Dog Rescue Day 24 – Brothers’ Day 27 – Memorial Day</p>	<p>2 – Cancer Survivors’ Day 5 – National Donut Day 14 – World Blood Donor Day 16 – Fathers’ Day 17 – Take Your Cat to Work Day 18 – International Sushi Day 19 – Juneteenth 21 – Take Your Dog to Work Day 28 – National Insurance Awareness Day</p> <p>Congratulate all your clients’ or employees’ children who have graduated college or school this month!!</p>
<p>SUGGESTED FINANCIAL COMMUNICATIONS</p> <ul style="list-style-type: none"> Disability Insurance Awareness Month Campaigns 	<p>SUGGESTED FINANCIAL COMMUNICATIONS</p> <ul style="list-style-type: none"> Insurance Awareness Campaigns (Business/Personal/Family) Financial Concepts for Recent College Grads Entering the Workforce

July	August
<p>1 – National Sandwich Generation Month 4 – Independence Day (Send “A” Clients Apple Pies!) 7 – World Chocolate Day 21 – National Ice Cream Day 25 – National Intern Day 26 – National Aunt and Uncle Day</p>	<p>4 – Sisters’ Day 4 – National Chocolate Chip Cookie Day 8 – International Cat Day 14 – National Financial Awareness Day 19 – National Aviation Day 26 – International Dog Day</p>
<p>SUGGESTED FINANCIAL COMMUNICATIONS</p> <ul style="list-style-type: none"> • Q2 Market Updates/Investment Briefings • Financial and wellness concepts for caregivers who are balancing the challenges of raising children and caring for aging parents. 	<p>SUGGESTED FINANCIAL COMMUNICATIONS</p> <ul style="list-style-type: none"> • Prepare campaigns for September Life Insurance Awareness Month. • Celebrate National Financial Awareness Day with social media posts on the benefits of financial planning.
September	October
<p>1 – Life Insurance Awareness Month 1 – College Savings Month 2 – Labor Day 6 – National 401(k) Day 7 – World Beard Day (First Saturday) 8 – Grandparents’ Day (First Sunday after Labor Day) 15 – Hispanic Heritage Month (Ends October 15th) 15 – Wife Appreciation Day 16 – National Working Parents’ Day 21 – World Alzheimer’s Day 21 – World Gratitude Day 25 – National Daughters’ Day 26 – Human Resource Professionals Day 28 – National Sons’ Day</p>	<p>1 – National Estate Planning Awareness Week/Month 1 – Cybersecurity Awareness Month 2 – World Financial Planning Day 6 – National Coaches’ Day 7 – Ageism Awareness Day (Awaiting official 2024 date) 11 – National Coming Out Day (LGBTQIA+) 12 – National Farmer’s Day 12 – Yom Kippur 14 – Indigenous Peoples’ Day (United States) 16 – National Bosses’ Day 20-26 – National Retirement Security/Planning Week 28 – National First Responders’ Day 29 – National Cat Day 31 – Halloween</p>
<p>SUGGESTED FINANCIAL COMMUNICATIONS</p> <ul style="list-style-type: none"> • Life Insurance Awareness Month • Term Conversion Campaigns/Beneficiary Audit Reminder Letters • 401(k) Contribution Educational Campaigns • Financial Concepts for Dual Parent Working Households • Philanthropic/Charitable Gifting Campaigns 	<p>SUGGESTED FINANCIAL COMMUNICATIONS</p> <ul style="list-style-type: none"> • Retirement and Longevity Planning Campaigns • Roth IRA/IRA/SEP Contribution Reminders • National Estate Planning Awareness Week/Month Campaigns • Cybersecurity Awareness Month Campaigns • Family “Financial Fire Drill” Campaigns

November	December
<ul style="list-style-type: none"> 1 – Diwali Festival of Lights 1 – Long-Term Care Awareness Month 1 – National Family Caregivers Month 3 – Set Clocks Back (Daylight Savings Time Ends) 8 – National STEM/STEAM Day 11 – Veterans’ Day 13 – World Kindness Day 14 – World Diabetes Day 15 – National Philanthropy Day 19 – International Men’s Day 19 – National Entrepreneurs’ Day 23 – National Adoption Day 28 – Thanksgiving 30 – Small Business Saturday 	<ul style="list-style-type: none"> 1 – National Identity Theft Prevention and Awareness Month 3 – United Nation’s International Day of Persons with Disabilities 3 – Giving Tuesday 5 – International Volunteer Day 13 – National Hot Cocoa Day 24 – Christmas Eve 25 – Hanukkah (through January 2nd) 25 – Christmas 26 – Kwanzaa (Ends January 1st) 31 – New Year’s Eve
<p>SUGGESTED FINANCIAL COMMUNICATIONS</p> <ul style="list-style-type: none"> • Long-Term Care (LTC) Awareness Month Campaigns • Financial and Wellness concepts for Caregivers • Business Planning Campaigns for Entrepreneurs • Philanthropic/Gifting Tax Planning Campaigns • Announce your firm’s/team’s philanthropic efforts and thank your clients for helping make the contributions possible. 	<p>SUGGESTED COMMUNICATIONS</p> <ul style="list-style-type: none"> • Concepts on Identity Theft Protection (especially during the holiday shopping season). • Prepare Holiday Cards • Prepare New Year’s Celebration Cards

Helpful Websites:

www.nationaldaycalendar.com

www.nationaltoday.com

www.lifehappens.org

Greeting Cards for Special Appreciation Days:

www.greetingcarduniverse.com

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