osaic
Empowering Wealth

# Client Engagement

## 2026 Monthly Advisor Reference

**You create exceptional Moments That Matter for your clients.** As you look ahead to 2026, this calendar is designed to help you prepare for the meaningful moments to come. Whether you're planning seasonal campaigns, client reviews, or educational outreach, this reference offers timely themes, observances, and actionable tips to spark ideas and streamline your efforts. To support your planning, we've also included **market closure holidays**.

## Q1

### January

**Financial Wellness Month**

- **1** New Year's Day
- **19** Martin Luther King Jr. Day
- **25–31** National College Financial Prep Week

**Annual Review Tip:** Begin the year with a clear plan for scheduling reviews and add more personalized touchpoints than last year.

### February

**Financial Aid Awareness Month**

- **16** President's Day

**Milestone Birthdays Tip:** Strategize how to honor birthdays, especially those tied to retirement, Social Security eligibility, or RMDs.

### March

**Review Your Client Onboarding Process**

**New Client Welcome Initiative Tip:** Successful advisors make new clients feel valued and clearly communicate available services. Review your onboarding process, create a welcome kit, and set best practices for client engagement.

## Q2

### April

**Financial Literacy Month & National Social Security Month**

- **3** New Year's Day
- **6–10** America Saves Week
- **15–21** Money Smart Week
- **Mid-Month** National Retirement Planning Week

**Professional Photo Tip:** If it's been more than three years since you updated your headshot, now is the perfect time. Photographers tend to have more availability this month.

### May

**Small Business Month & Older Americans Month** (financial security themes)

- **25** Memorial Day
- **29** 529 College Savings Plan Day
- **3–9** Small Business Week

**Graduation Tip:** Late spring is a popular time for graduations. Email helpful articles or send a thoughtful Surprise and Delight gift to clients with graduating family members.

### June

**Review Surprise & Delight Guide**

- **19** Juneteenth National Independence Day

**Vacation Season Tip:** Share Summer Digital Security tips as vacation season begins.

**Wedding Season Tip:** June is peak wedding season; encourage couples to meet with a financial professional for planning, insurance review, and benefits integration. Suggest a complimentary review.

## Q3

### July

**Review Your Digital Footprint**

- **3** Independence Day

**Website Tip:** Review your website to ensure content is relevant, contact details are accurate, and photos are updated.

**Social Media Tip:** Audit your social media to ensure a balanced mix of fresh content and strategic reposts that build trust and reflect your personality.

### August

**Review Q4 Plans & Events**

**Back-to-School Tip:** As summer ends, review and update fourth-quarter marketing plans. Plan upcoming review day events (e.g., Annuity, IRA, Life Insurance Reviews) to stay on track.

### September

**Life Insurance Awareness Month & College Savings Month**

- **7** Labor Day

**Email Signature Tip:** If designed in an effective manner, email signatures can help accomplish marketing objectives such as generating more referrals. Ensure your signature is branded, compliant, and has a call-to-action aligned with your business goals.

## Q4

### October

**National Cybersecurity Awareness Month** (includes financial data protection)

- **8** Financial Planning Day
- **20–24** Estate Planning Awareness Week

**Holiday Tip:** Start planning now for holiday gifts and events. Review ideas in the Surprise and Delight Guide for inspiration.

### November

**Long-Term Care Awareness Month**

- **26** Thanksgiving Day

**By the Numbers Tip:** In late Q4, advisor marketing platforms publish client-ready pieces on key financial numbers for the new year. Share articles on topics like Health Savings Account limits, Retirement Plan limits, and important financial dates to keep clients informed.

### December

**Review Use of Marketing Platforms**

- **25** Christmas Day

**Marketing Platform Tip:** Set aside a dedicated hour to review how you're using your marketing platform. Ask yourself: Are you leveraging all its features to maximize impact? Are new clients fully integrated into your engagement strategy? What opportunities exist to strengthen your use and efforts?

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