



INVESTMENTS

PRACTICE MANAGEMENT | FOR YOUR BUSINESS

# 2024 Client Outreach Opportunities



ADVISOR ADVANCEMENT INSTITUTE

## Maximize relationships. Increase engagement.

In a constantly evolving financial services landscape – where a sea of financial guidance and options are a click away – advisors are faced with the challenge of demonstrating their value to clients in a manner that goes beyond product and performance. By making relationship-building a regular part of your business model, you can solidify your commitment to your clients and differentiate yourself from other advisors.

Our studies show that in order to get high satisfaction ratings from clients, advisors need to proactively communicate about 25 times a year. The 2024 Client Outreach Calendar is designed to help you engage in meaningful ways with your clients by hosting events, giving thoughtful gifts, or connecting with clients based on their hobbies and interests. The calendar includes color-coded themes, from financial education to sports events, and there are as many holidays and events as you can think of.

Decide which themes below correspond best to your clients and get started planning your next event!

- Financial Education
- Health & Fitness
- Food & Drink
- Sports
- Environmentally Friendly
- Client Appreciation
- Seasonal & Holiday
- Charity/Philanthropy

FOR INSTITUTIONAL USE ONLY. NOT FOR USE WITH THE GENERAL PUBLIC.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 New Year's Day National Bloody Mary Day College Regular Decision Application Deadline Rose Bowl	2	3	4 Trivia Day	5	6
7 Old Rock Day	8 Clean Off Your Desk Day	9 Law Enforcement Day	10 Cut Your Energy Costs Day	11	12 National Pharmacists' Day	13 Make Your Dreams Come True Day
14 Organize Your Home Day	15 Martin Luther King Jr. Day	16	17 Kid Inventors' Day International Mentoring Day	18	19 Get to Know Your Customers Day	20
21	22 Hot Sauce Day	23	24 Compliment Day	25	26 Spouse Day	27
28	29	30	31	Month National Mentoring Month Financial Wellness Month Thank You Month	Week 14th-20th National Mocktail Week 14th-20th National Pizza Week 14th-20th Universal Letter Writing Week	

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Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>Month</b> Senior Independence Month Time Management Month National Cancer Prevention Month American Heart Month Black History Month	<b>Week</b> 5th-11th International Networking Week 18th-24th Engineers Week			1	2	3
4	5	6	7 Girls and Women in Sports Day Send a Card to a Friend Day National Signing Day (High School Athletes for College)	8	9 Groundhog Day	10
Thank Your Mailman Day	Weatherpersons Day Chocolate Fondue Day			Boy Scouts Day	Bagel and Lox Day	Chinese New Year
11  Super Bowl Make a Friend Day	12	13  Mardi Gras	14  Valentine's Day Library Lovers Day Daytona 500 International Book Giving Day	15	16	17  Random Act of Kindness Day
18	19	20	21	22	23	24
	Presidents' Day Chocolate Mint Day	Love Your Pet Day		Margarita Day		World Bartenders Day Tortilla Chip Day
25	26  Pistachio Day	27	28	29  Leap Year		

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<b>Month</b> Credit Education Month Women's History Month National Investors' Month American Red Cross Month	<b>Month</b> Asset Management Awareness Month National Nutrition Month	<b>Week</b> 1st-7th National Invest in Veterans Week 25th-31st National Physicians Week			1  Employee Appreciation Day World Candle Day	2  Teen Mental Wellness Day National Read Across America Day
3  World Wildlife Day World Hearing Day	4	5	6  National Dentists' Day National Oreo Cookie Day	7  World Plant Power Day	8  International Women's Day	9
10  Academy Awards	11	12  National Working Moms Day National Girl Scouts Day	13	14  National Popcorn Lover's Day National Potato Chip Day	15	16  National Corn Dog Day
17	18	19  First Day of Spring International Client's Day	20	21  National Single Parent's Day	22	23
24  National Cocktail Day	25	26	27	28	29	30
31  National Crayon Day	International Waffle Day			MLB Opening Day	National Mom and Pop Business Owners Day	Doctor's Day

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
	April Fool's Day	Autism Awareness Day	National Walking Day	National Burrito Day		National Student-Athlete Day
7	8	9	10	11	12	13
National Beer Day World Health Day	College Basketball National Championship Masters		National Siblings Day National Pet Day Golfer's Day		National Grilled Cheese Sandwich Day	
14	15	16	17	18	19	20
	Tax Day		Administrative Professional's Day			NBA Playoffs
21	22	23	24	25	26	27
	Earth Day	World Book Day		Take Our Daughters and Sons to Work Day	Pretzel Day	National Teach Children to Save Day
28	29	30	Month Financial Literacy Month Customer Loyalty Month Volunteer Month	Week 9th-15th Student Employment Week		
	International Dance Day					

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Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>Month</b> Family Wellness Month Barbeque Month Jewish American Heritage Month	<b>Month</b> Military Appreciation Month Mental Health Awareness Month	<b>Week</b> 7th-14th Small Business Week 7th-14th Teacher Appreciation Week	1  School Principals' Day	2  International Harry Potter Day	3	4  Kentucky Derby Star Wars Day
5  National Lemonade Day	6	7  Teacher's Day	8  National Student Nurse Day National Receptionists Day	9	10  National Golf Day	11
12  Mother's Day International Nurses Day	13  PGA Championship World Cocktail Day	14	15  National Pizza Party Day	16	17  Endangered Species Day	18  Armed Forces Day National Learn to Swim Day World Whiskey Day Preakness Stakes
19  World Baking Day	20  National Rescue Dog Day	21  International Tea Day	22	23	24	25  National Wine Day
26	27  Memorial Day	28	29	30  National Creativity Day	31	

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<b>Month</b> Camping Month Homeownership Month Alzheimer's & Brain Awareness Month LGBTQ+ Pride Month Men's Health Month	<b>Week</b> 1st-9th Fishing and Boating Week 2nd-9th Business Etiquette Week 25th-July 1st Boys & Girls Club Week					1  World Reef Awareness Day National Say Something Nice Day National Red Rose Day
2	3  World Bicycle Day	4  National Cheese Day	5  World Environment Day Global Running Day	6	7  National Donut Day	8  National Best Friends Day World Oceans Day Belmont Stakes
9  National Children's Day	10  National Iced Tea Day	11	12	13  World Softball Day U.S. Open (Golf)	14  Flag Day World Blood Donor Day National Bourbon Day	15
16  Father's Day National Fudge Day	17	18  International Sushi Day International Picnic Day	19  Juneteenth	20  International Surfing Day First Day of Summer	21  International Yoga Day	22  World Rainforest Day
23 International Women in Engineering Day	24	25	26	27  National Bingo Day	28  National Insurance Awareness Day	29
30						

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<div>Month</div> <div>Plastic Free July</div> <div>National Minority Mental Health Awareness Month</div>	<div>1</div> <div>International Joke Day</div>	<div>2</div>	<div>3</div> <div>International Plastic Bag Free Day</div>	<div>4</div> <div>Independence Day</div>	<div>5</div>	<div>6</div> <div>National Fried Chicken Day</div>
<div>7</div> <div>World Chocolate Day</div>	<div>8</div>	<div>9</div>	<div>10</div>	<div>11</div> <div>7/11 Day</div> <div>Mojito Day</div>	<div>12</div>	<div>13</div> <div>National French Fry Day</div> <div>National Mac and Cheese Day</div>
<div>14</div>	<div>15</div> <div>National Give Something Away Day</div>	<div>16</div>	<div>17</div>	<div>18</div>	<div>19</div>	<div>20</div> <div>International Chess Day</div>
<div>21</div> <div>National Ice Cream Day</div>	<div>22</div>	<div>23</div>	<div>24</div> <div>National Tequila Day</div>	<div>25</div> <div>National Wine and Cheese Day</div> <div>National Intern Day</div>	<div>26</div> <div>Summer Olympics</div> <div>National Disability Awareness Day</div>	<div>27</div> <div>National Korean War Veteran Day</div> <div>National Scotch Day</div>
<div>28</div> <div>National Parent's Day</div> <div>National Milk Chocolate Day</div>	<div>29</div> <div>National Lasagna Day</div> <div>National Chicken Wings Day</div>	<div>30</div> <div>International Friendship Day</div> <div>National Cheesecake Day</div>	<div>31</div> <div>National Avocado Day</div>			



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>Month</b> Family Fun Month	<b>Week</b> 4th-11th Exercise with Your Child Week 25th-31st National Be Kind to Humankind Week			1  World Lung Cancer Day National IPA Day	2  International Beer Day	3  National Watermelon Day
4 Coast Guard Day Single Working Women's Day Sister's Day National Chocolate Chip Cookie Day	5  National Oyster Day	6	7  Purple Heart Day	8	9  National Book Lover's Day International Coworking Day	10  National Bowling Day
11  National Son and Daughter Day	12  International Youth Day	13  National Filet Mignon Day National Prosecco Day	14  National Financial Awareness Day	15	16  National Rum Day	17  National Nonprofit Day
18  National Fajita Day	19  World Photography Day	20  National Radio Day	21  National Senior Citizen's Day	22	23	24
25	26 Women's Equality Day National Dog Day U.S. Open (Tennis)	27	28  National Thoughtful Day National Red Wine Day	29	30  National Beach Day Grief Awareness Day	31  Eat Outside Day

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1  American Chess Day World Letter Writing Day	2  Labor Day	3	4  National Wildlife Day	5  International Day of Charity National Cheese Pizza Day	6  Read a Book Day National 401(k) Day National Food Bank Day	7  National Salami Day
8  Grandparents Day	9  International Sudoku Day National Teddy Bear Day	10  World Suicide Prevention Day	11  9/11 Memorial Day	12  National Day of Encouragement National Chocolate Milkshake Day	13  Positive Thinking Day International Chocolate Day National Peanut Day National Celiac Disease Awareness Day	14
15  World Lymphoma Awareness Day National Linguine Day	16  National Working Parents Day	17  International Country Music Day National IT Professionals Day	18  U.S. Airforce Day National Cheeseburger Day	19	20  National Queso Day National Pepperoni Pizza Day	21  National CleanUp Day International Day of Peace Oktoberfest National Gymnastics Day World Alzheimer's Day
22  National White Chocolate Day American Business Women's Day First Day of Fall	23  National Family Day International Day of Sign Languages	24	25  National Lobster Day World Dream Day International Daughter's Day	26  National Dumpling Day	27	28  National Family Health & Fitness Day National Son's Day
29  National Coffee Day National Starbucks Day International Awareness of Food Loss and Waste	30  National Love People Day	Month Disaster Preparedness Month Healthy Aging Month Intergeneration Month Nutrition Month	Week 21st-October 6th Oktoberfest			

Sunday		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Financial Education	Month Financial Planning Month Breast Cancer Awareness Month Country Music Month	Month Global Diversity Awareness Month Emotional Awareness Month	1  National Homemade Cookies Day International Music Day	2  World Financial Planning Day	3	4 National Taco Day National Cinnamon Roll Day National Golf Lover's Day World Animal Day	5  World Teacher's Day
	6  National Coaches Day National Noodle Day World Cerebral Palsy Day	7  Child Health Day World Architecture Day	8	9  National Emergency Nurses Day	10  World Mental Health Day World Homeless Day	11  National Coming Out Day	12  National Savings Day
	13	14  Indigenous Peoples Day	15	16  Boss' Day World Food Day	17  National Pasta Day	18	19
	20	21	22  National Nut Day	23	24  National Food Day	25	26  National Pumpkin Day
	27  US Navy Day	28  National First Responders Day	29  National Cat Day	30  National Candy Corn Day	31  Halloween		
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2024 | November

Client Outreach Opportunities

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<b>Month</b> Adoption Month Family Caregivers Month PTA Healthy Lifestyles Month Military Family Month	<b>Week</b> 12th-18th International Fraud Awareness Week 18th-22nd National Education Week				1  National Stress Awareness Day Early Decision College App Deadlines	2
3  National Sandwich Day	4	5  Election Day	6	7	8	9
10	11  Veterans Day	12	13  World Kindness Day	14  National Pickle Day World Diabetes Day	15  America Recycles Day National Philanthropy Day	16  National Fast Food Day
17  National Take a Hike Day	18	19	20  Children's Day	21	22	23  National Espresso Day
24	25	26  National Cake Day	27	28  Thanksgiving	29  Black Friday	30  Small Business Saturday

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Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 Cyber Monday	3 National Day of Giving/Giving Tuesday International Day of Persons with Disabilities	4 National Cookie Day	5	6	7 Pearl Harbor Day
8	9	10	11	12 International Universal Health Coverage Day	13 National Cocoa Day U.S. National Guard Day	14
15	16	17 National Maple Syrup Day	18	19	20	21 Start of Winter
22	23	24	25	26 Thank You Note Day	27	28 Card Playing Day
29	30	31 New Year's Eve No Interruptions Day – Last Work Day of the Year	Month Stress Free Family Holiday Month Write a Business Plan Month Write a Friend Month Human Rights Month			

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