



INVESTMENTS



ADVISOR ADVANCEMENT INSTITUTE

# 2025 Client Outreach Opportunities





# Engage

## Your Clients and Prospects

### 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 2025 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



### Pro Tip

#### Financial Wellness Month

Offer a virtual or in-person event for clients and their children centered on developing successful financial wellness strategies to help them reach their financial and life goals.

# 2025 January | Client Outreach Opportunities

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	<b>Month</b> National Mentoring Month Financial Wellness Month Thank You Month  <b>Week</b> 12th-18th National Mocktail Week 12th-18th National Pizza Week 12th-18th Universal Letter Writing Week
5	6	7  Old Rock Day	8	9  Law Enforcement Day	10  Cut Your Energy Costs Day	11	
12  National Pharmacists' Day	13 Clean Off Your Desk Day Make Your Dreams Come True Day	14 Organize Your Home Day	15 National Bagel Day	16 Get to Know Your Customers Day	17 Kid Inventors' Day International Mentoring Day	18	
19	20  Martin Luther King Jr. Day	21	22 Hot Sauce Day	23	24 Compliment Day	25	
26  Spouse Day	27	28	29 Chinese New Year	30	31		

Financial Education	Health & Fitness	Food & Drink	Sports	Environmentally Friendly	Client Appreciation	Seasonal & Holiday	Charity/Philanthropy	Miscellaneous
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February is often overshadowed by the holidays that come before it and the spring months that come after. But just because it's the shortest month of the year doesn't mean there aren't plenty of ways to entertain your clients.

February begins with athletics. Though the Super Bowl might dominate our attention, the month offers numerous opportunities to engage with clients. Consider hosting a virtual game-watching party or organizing a friendly competition among clients, such as a winter sports trivia event. February provides ample chances to foster camaraderie and strengthen client relationships beyond typical financial conversations.

This month, there are plenty of ways to focus on:

- Client Appreciation
- Food & Drink
- Sports

### Pro Tip

#### **The Super Bowl February 9**

Help your clients celebrate the big game by sending over a gift basket full of all the fixings they need to create an unforgettable Super Bowl party, including decorations and vouchers for pizza and wings from area restaurants.

For a less expensive option, consider sending your clients a mug or hat sporting their favorite team's logo.

# 2025 February | Client Outreach Opportunities

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

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March is the month when things begin to warm up. Though January might be when the new year begins, March is when things begin to feel new. We start going outside and meeting up with friends and colleagues. This is a great way to reach out to and empower your women clients to take control of their finances.

This month, there are plenty of ways to engage through:

- Education
- Client Appreciation

### Pro Tip

#### **International Women's Day March 8**

Hold an in-person or virtual webinar that highlights women in investing. If you have a concentration of clients in the same area, you could host a "Margaritas and Markets" cocktail hour for your women clients to enjoy and network.

# 2025 March | Client Outreach Opportunities

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

- Financial Education
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April showers may bring May flowers, but April also brings more opportunities to reach out and build relationships with all your clients. Whether they're looking to expand their portfolio or diversify what they already have, April is the month to make an impression.

This month, there are plenty of ways to engage through:

- Education
- Activities



### Pro Tip

#### **National Pet Day April 11**

One of the quickest ways to anyone's heart is through their pets, and your clients are no different. Surprise your clients who are pet parents with delicious treats or engaging toys for their favorite four-legged friends. This gesture is sure to stand out and fetch your business more meetings.



# 2025 April | Client Outreach Opportunities

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

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May is the month to bring people together and capitalize on all the good feelings that warmer weather brings out. This is the month to invest in your clients and their desire to link up and hit around some new ideas regarding their finances.

This month, there are plenty of ways to engage by focusing on:

- Sports
- Food & Drink
- Client Appreciation

### Pro Tip

#### **National Golf Day May 10**

Send clients a sleeve of golf balls and tees or a voucher to a local Top Golf or driving range. You could also book an afternoon with a golf pro at a local course or driving range and help your clients brush up on their swing and grow their confidence in a game that is so important to business and networking.

# 2025 May | Client Outreach Opportunities

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

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When the calendar turns to June, we're halfway through the year. This is a great time for clients to assess how the year has been going and plan how they want the rest of the year to go. Invite them to look back and plan. Your clients will be happy you did.

This month, there are plenty of ways to engage by focusing on:

- Food & Drink
- Education



### Pro Tip

#### **National Donut Day June 6**

Nothing starts a morning off better than a box of donuts. Invite your clients to a breakfast get-together at your office.

# 2025 June | Client Outreach Opportunities

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

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July should be a time for fun and relaxation. It's the heart of the summer, but between holidays, vacations, and kids' activities, the summer can be just as busy. This month, help your clients kick back and relax by taking away some of the worries that can come from our busy lifestyles.

This month, there are plenty of ways to engage by focusing on:

- Food & Drink
- Entertainment

### Pro Tip

#### Fourth of July July 4

There's nothing more American than an ice cream. This 4th of July, before the BBQs and fireworks start, host an ice cream social at your office for your clients and their families that will deliver smiles for young and old alike. While the kids enjoy their ice cream cones, sundaes, or floats, you can provide a quick and interactive financial literacy lesson for your clients and their children. After all, it's never too early to start teaching the next generation.

# 2025 July | Client Outreach Opportunities

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

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For your clients, August might be a time for getting their kids ready for school. Many may still be saving for their children's education, but that doesn't mean they can't start planning for that time when the nest is empty. This is the perfect time to highlight the benefits of knowing what to do with their money next.

This month, there are plenty of ways to engage by focusing on:

- Education

### Pro Tip

#### **National Financial Awareness Day August 14**

This is the perfect opportunity to engage with your clients and help them take control of their financial future. Host a budgeting and savings workshop, and you'll not only provide them with a valuable financial education, but you'll also strengthen your relationships and show your clients that you're invested in their long-term financial success.



# 2025 August | Client Outreach Opportunities

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

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Whether it's the end of vacations or school being back in session, it's clear that summer is over, and life is getting back on schedule. It's time to start planning again. September begins with Labor Day, and that's why this month is a great time to encourage clients and prospects to imagine what life will be like when their work is done.

This month, there are plenty of ways to engage by focusing on:

- Food and Drink
- Entertainment
- Client Appreciation

### Pro Tip

#### National 401(k) Day September 5

Host a virtual webinar or in-person event for your clients and their families that explores the world of retirement savings. Dive into the power of 401(k)s, IRAs and other savings vehicles. Help demystify the process and highlight the importance of contributing early and often.

This is a great opportunity to invite your clients' children, whether they're still in school or just starting their careers. It's never too early to start learning about the magic of compound interest and the impact of time on their savings. Empowering the next generation will help set them up for a lifetime of smart money habits. You might also get a new client too.

# 2025 September | Client Outreach Opportunities

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
	1  Labor Day American Chess Day World Letter Writing Day	2	3	4  National Wildlife Day	5  International Day of Charity National Cheese Pizza Day National Food Bank Day National 401(k) Day	6  Read a Book Day	<b>Month</b> Disaster Preparedness Month Healthy Aging Month Intergeneration Month Nutrition Month
7  National Salami Day Grandparents Day	8	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	<b>Week</b> Sept. 20th - Oct. 5th Oktoberfest
14  National Sober Day	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 Clean Up Day National Queso Day National Pepperoni Pizza Day National Gymnastics Day	
21  International Day of Peace World Alzheimer's Day	22  National White Chocolate Day American Business Women's Day First Day of Fall National Family Day	23  International Day of Sign Languages	24	25  National Lobster Day World Dream Day National Daughter's Day	26  National Dumpling Day	27  National Family Health & Fitness Day	
28  National Son's Day	29  National Coffee Day National Starbucks Day International Awareness of Food Loss and Waste	30  National Love People Day					

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As we kick off the 4th quarter of the year, let your clients know that there's nothing scarier than getting surprised by unforeseen events in the market. This is the time to start planning for next year. Offer your clients a way to get ahead of the curve, diversify their portfolios and help them feel confident in their financial future.

This month, there are plenty of ways to engage by focusing on:

- Food and Drink
- Entertainment
- Client Appreciation

### Pro Tip

#### Financial Planning Month

Just because the kids are getting something sweet this month doesn't mean the adults can't get a treat, too. Send your clients a handy checklist to help them stay organized with their paperwork. This checklist can include where to find important documents and key contact information, ensuring they have everything in order and easily accessible.

# 2025 October | Client Outreach Opportunities

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

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In recent years, November has been overwhelmed by December. It's part of the holiday season, but we don't spend much time giving and showing thanks to those we love the most. This November, we think giving thanks for your clients might pay off in a big way.

This month, there are plenty of ways to engage by focusing on:

- **Client Appreciation**

### Pro Tip

#### **Thanksgiving November 27**

Strengthen client connections this November by sharing a taste of gratitude. Email your clients a heartfelt message with a cherished family recipe, or consider sending a Thanksgiving pie from a local bakery to enjoy with their loved ones. It's a delightful way to express your appreciation while staying top-of-mind as we get closer to the end of the year.

# 2025 November | Client Outreach Opportunities

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

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### Maximize relationships. Increase engagement.

We've made it through another year, and December is when we spend some time looking back. Encourage your clients to plan a review in the new year with you so they can get an early start on planning in 2026.

This month, there are plenty of ways to engage by focusing on:

- **Charity**
- **Client Appreciation**

### Pro Tip

#### **National Thank You Note Day December 26**

This is a chance for you to say 'thank you' to each of your clients. Before the end of the year, send hand-written and personalized notes that show how much they mean to you and the value they bring to your practice.

To make it even more meaningful, you can include a tasteful edible arrangement, a bottle of wine, a selection of premium chocolates or something specifically tailored to each client's preference.



# 2025 December | Client Outreach Opportunities

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

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