



# Seminar Planning Calendar

2026

First things first.

# Establish a *marketing plan.*

Ask yourself: How often should I host events to meet my goals? Even if you're not ready to book months ahead, you should at least have a strategy and tentative schedule in place.

Partner with a dedicated AcquireUp Marketing Consultant to map out a long-term strategy. Whether you opt for monthly seminars for steady lead flow, quarterly event for balanced scheduling, or seasonal timing to align with key decision periods, they'll help craft a plan that fits your goals and budget.



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# December 2025



| Sun                       | Mon    | Tue    | Wed                      | Thu                     | Fri                      | Sat                        |
|---------------------------|--------|--------|--------------------------|-------------------------|--------------------------|----------------------------|
| 30                        | 1<br>  | 2<br>  | 3<br>                    | 4<br>                   | 5<br>                    | 6<br>Educational Only<br>  |
| 7<br>                     | 8<br>  | 9<br>  | 10<br>                   | 11<br>                  | 12<br>                   | 13<br>Educational Only<br> |
| 14<br>Chanukah Begins<br> | 15<br> | 16<br> | 17<br>                   | 18<br>                  | 19<br>                   | 20<br>Educational Only<br> |
| 21<br>                    | 22<br> | 23<br> | 24<br>Christmas Eve<br>  | 25<br>Christmas Day<br> | 26<br>Kwanzaa Begins<br> | 27<br>                     |
| 28<br>                    | 29<br> | 30<br> | 31<br>New Year's Eve<br> | 1                       | 2                        | 3                          |

Ask about our campaigns for these topics.

## Performance-Based

- Taxes in Retirement
- Social Security
- Medicare
- Estate Planning
- College Planning

## Custom-Crafted

- IRA Holders/ Roth Conversion
- General Retirement
- Estate Planning
- Taxes
- Wealth Management
- Affluent Women
- Social Security
- Safe Money

## Get started now!

To ensure success, begin planning at least 5 weeks before your first event date.

## Notes

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Excellent Dates

Caution Call Us

Late-Morning & Lunch Events Only

Not Recommended

# January 2026



| Sun | Mon               | Tue | Wed | Thu                 | Fri | Sat                    |
|-----|-------------------|-----|-----|---------------------|-----|------------------------|
| 28  | 29                | 30  | 31  | 1<br>New Year's Day | 2   | 3<br>Educational Only  |
| 4   | 5                 | 6   | 7   | 8                   | 9   | 10<br>Educational Only |
| 11  | 12                | 13  | 14  | 15                  | 16  | 17<br>Educational Only |
| 18  | 19<br>MLK Jr. Day | 20  | 21  | 22                  | 23  | 24<br>Educational Only |
| 25  | 26                | 27  | 28  | 29                  | 30  | 31<br>Educational Only |

**New Year, New Goals—**  
With resolutions top of mind, January is the perfect time to host seminars and help prospects start strong.

Work with your AcquireUp Marketing Consultant to receive a complimentary demographic analysis of your entire marketing area. This analysis will help you identify marketing quadrants to target throughout the year for maximum impact.

## Notes

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# February 2026



| Sun     | Mon                        | Tue     | Wed     | Thu     | Fri     | Sat                         |
|---------|----------------------------|---------|---------|---------|---------|-----------------------------|
| 1<br>✖  | 2<br>✓                     | 3<br>✓  | 4<br>✓  | 5<br>✓  | 6<br>⚠  | 7<br>Educational Only<br>📞  |
| 8<br>✖  | 9<br>✓                     | 10<br>✓ | 11<br>✓ | 12<br>✓ | 13<br>⚠ | 14<br>Valentine's Day<br>✖  |
| 15<br>✖ | 16<br>President's Day<br>📞 | 17<br>✓ | 18<br>✓ | 19<br>✓ | 20<br>⚠ | 21<br>Educational Only<br>📞 |
| 22<br>✖ | 23<br>✓                    | 24<br>✓ | 25<br>✓ | 26<br>✓ | 27<br>⚠ | 28<br>Educational Only<br>📞 |

**Which days of the week work best?**

For optimal attendance, schedule your events on Mondays, Tuesdays, Wednesdays, and Thursdays. Friday lunches can also be effective, depending on your target demographics. Some marketers host two events in a single week while others find that scheduling them across two weeks is more effective. The key is to provide prospects with multiple options to increase attendance.

**How often should prospects receive invitations when targeting via direct mail?**

Fresh, engaging content delivers better results and prevents audience fatigue. Avoid mailing the same offer to prospects more than once every 60-90 days to maintain interest and avoid oversaturation.

**Notes**

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Caution Call Us

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Late-Morning & Lunch Events Only

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Not Recommended

# March 2026



| Sun                              | Mon     | Tue                          | Wed     | Thu     | Fri     | Sat                         |
|----------------------------------|---------|------------------------------|---------|---------|---------|-----------------------------|
| 1<br>⊗                           | 2<br>✓  | 3<br>✓                       | 4<br>✓  | 5<br>✓  | 6<br>⚠  | 7<br>Educational Only<br>📞  |
| 8<br>Daylight Saving Starts<br>⊗ | 9<br>✓  | 10<br>✓                      | 11<br>✓ | 12<br>✓ | 13<br>⚠ | 14<br>Educational Only<br>📞 |
| 15<br>⊗                          | 16<br>✓ | 17<br>St. Patrick's Day<br>📞 | 18<br>✓ | 19<br>✓ | 20<br>⚠ | 21<br>Educational Only<br>📞 |
| 22<br>⊗                          | 23<br>✓ | 24<br>✓                      | 25<br>✓ | 26<br>✓ | 27<br>⚠ | 28<br>Educational Only<br>📞 |
| 29<br>⊗                          | 30<br>✓ | 31<br>✓                      | 1       | 2       | 3       | 4                           |

**Tax Prep Season—**  
Prospects are already focused on finances, the ideal backdrop for events focused on tax-smart retirement and wealth planning.

**Timing matters: Don't ignore market demographics when deciding on event times.**  
Evening and dinner-time events often attract higher attendance than lunch events, especially if your target demographic includes working professionals. Most prospects under the age of 62 find it difficult to attend midday sessions due to work commitments.

To maximize turnout, plan at least one dinner event if your audience includes younger retirees or pre-retirees. A good rule of thumb? **Offer multiple options within each campaign**—like a dinner and a lunch, or events on different dates to maximize attendance and reach a broader range of prospects.

## Notes

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# April 2026



| Sun         | Mon                | Tue | Wed                   | Thu | Fri              | Sat                    |
|-------------|--------------------|-----|-----------------------|-----|------------------|------------------------|
| 29          | 30                 | 31  | 1<br>April Fool's Day | 2   | 3<br>Good Friday | 4<br>Educational Only  |
| 5<br>Easter | 6<br>Easter Monday | 7   | 8                     | 9   | 10               | 11<br>Educational Only |
| 12          | 13                 | 14  | 15                    | 16  | 17               | 18<br>Educational Only |
| 19          | 20                 | 21  | 22<br>Earth Day       | 23  | 24               | 25<br>Educational Only |
| 26          | 27                 | 28  | 29                    | 30  | 1                | 2                      |

**When it comes to direct mail campaigns, our data indicates that your best prospects are more likely to respond to a formal “wedding style” invitation.**

Focus on crafting a compelling message and highlighting your bio to connect with motivated prospects. The right tone and a personal touch can significantly boost your response rates.

**When leveraging digital marketing, don't put all your efforts into one channel.**

Use a variety of digital mediums—email marketing, social ads, retargeting, and more—to provide multiple touchpoints. This multi-channel approach keeps your brand top of mind, enhances engagement, and increases the likelihood of conversions.

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# May 2026



| Sun                    | Mon                    | Tue                    | Wed    | Thu    | Fri    | Sat                        |
|------------------------|------------------------|------------------------|--------|--------|--------|----------------------------|
| 26                     | 27                     | 28                     | 29     | 30     | 1<br>  | 2<br>Educational Only<br>  |
| 3<br>                  | 4<br>                  | 5<br>Cinco de Mayo<br> | 6<br>  | 7<br>  | 8<br>  | 9<br>Educational Only<br>  |
| 10<br>Mother's Day<br> | 11<br>                 | 12<br>                 | 13<br> | 14<br> | 15<br> | 16<br>Educational Only<br> |
| 17<br>                 | 18<br>                 | 19<br>                 | 20<br> | 21<br> | 22<br> | 23<br>Educational Only<br> |
| 24<br>                 | 25<br>Memorial Day<br> | 26<br>                 | 27<br> | 28<br> | 29<br> | 30<br>Educational Only<br> |
| 31<br>                 | 1                      | 2                      | 3      | 4      | 5      | Excellent Dates<br>        |

## Always plan ahead and stay consistent.

Many financial professionals achieve their greatest growth by committing to a well-thought-out yearly marketing plan. Remember, success isn't about hitting 100% every time—it's about staying consistent and letting those efforts compound. That's how you optimize ROI and build predictable growth over the long run.

## Be specialized and focus on your strengths.

Your unique strengths and specialization set you apart. Make sure prospects see you as the expert they can trust—someone who understands their unique financial situation and delivers the right advice to meet their needs. Clear positioning builds credibility and attracts the right clients.

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| Caution<br>Call Us | Late-Morning &<br>Lunch Events<br>Only | Not<br>Recommended |



# June 2026



| Sun                    | Mon    | Tue    | Wed    | Thu    | Fri                  | Sat                        |
|------------------------|--------|--------|--------|--------|----------------------|----------------------------|
| 31                     | 1<br>  | 2<br>  | 3<br>  | 4<br>  | 5<br>                | 6<br>Educational Only<br>  |
| 8<br>                  | 8<br>  | 9<br>  | 10<br> | 11<br> | 12<br>               | 13<br>Educational Only<br> |
| 15<br>                 | 15<br> | 16<br> | 17<br> | 18<br> | 19<br>Juneteenth<br> | 20<br>Educational Only<br> |
| 21<br>Father's Day<br> | 22<br> | 23<br> | 24<br> | 25<br> | 26<br>               | 27<br>Educational Only<br> |
| 29<br>                 | 29<br> | 30<br> | 1      | 2      | 3                    | 4                          |

## Mid-Year Reset—

Half the year is behind us. A perfect moment to review, reset, and re-plan with prospects.



## Refine your reach with highly-targeted lists.

Top producers often utilize asset levels, household income, or a combination of these criteria to refine their audience for maximum impact.

**Pro tip:** Ask about identifying fresh, unmailed prospects—an untapped audience who haven't been exposed to your message or your competition's.

**Amplify your efforts by pairing your mailing strategy with digital ads.** Platforms like Facebook allow you to broaden your reach online, ensuring your message is seen across multiple channels for maximum effectiveness.

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# July 2026



| Sun     | Mon     | Tue     | Wed     | Thu     | Fri     | Sat                         |
|---------|---------|---------|---------|---------|---------|-----------------------------|
| 28      | 29      | 30      | 1<br>✓  | 2<br>✓  | 3<br>✗  | 4<br>Independence Day<br>✗  |
| 5<br>✗  | 6<br>✓  | 7<br>✓  | 8<br>✓  | 9<br>✓  | 10<br>! | 11<br>Educational Only<br>☎ |
| 12<br>✗ | 13<br>✓ | 14<br>✓ | 15<br>✓ | 16<br>✓ | 17<br>! | 18<br>Educational Only<br>☎ |
| 19<br>✗ | 20<br>✓ | 21<br>✓ | 22<br>✓ | 23<br>✓ | 24<br>! | 25<br>Educational Only<br>☎ |
| 26<br>✗ | 27<br>✓ | 28<br>✓ | 29<br>✓ | 30<br>✓ | 31<br>! | 1                           |

## Top producers market in the summer months.

Why? Because they know it only takes one new client to pay for the entire campaign. Plus, with 13 weeks in the season, most prospects are at home and accessible—not always on vacation as commonly assumed.

## Test various campaign elements to maximize your results.

Experiment with campaign elements, such as topic, venue, and marketing strategy, but test one variable at a time to identify what drives the best outcomes. In some cases, “better” may actually mean less total responses but more clients. Focus on ROI, not just response rates to measure the true success of your marketing.

## Notes

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Not  
Recommended

# August 2026



| Sun | Mon | Tue | Wed | Thu | Fri | Sat                    |
|-----|-----|-----|-----|-----|-----|------------------------|
| 26  | 27  | 28  | 29  | 30  | 31  | 1<br>Educational Only  |
| 2   | 3   | 4   | 5   | 6   | 7   | 8<br>Educational Only  |
| 9   | 10  | 11  | 12  | 13  | 14  | 15<br>Educational Only |
| 16  | 17  | 18  | 19  | 20  | 21  | 22<br>Educational Only |
| 23  | 24  | 25  | 26  | 27  | 28  | 29<br>Educational Only |
| 30  | 31  | 1   | 2   | 3   | 4   | Excellent Dates        |

**Measure results and make adjustments.**  
Leverage tools like your mailing list or platforms such as [LeadJig](#) to effectively qualify prospects. Avoid selecting random ZIP codes based on assumptions about affluence. Instead, focus on targeting prospects within a defined radius around your venue that align with your specific demographic criteria for optimal results.

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Recommended

# September 2026



| Sun     | Mon                 | Tue     | Wed     | Thu     | Fri     | Sat                         |
|---------|---------------------|---------|---------|---------|---------|-----------------------------|
| 30      | 31                  | 1<br>✓  | 2<br>✓  | 3<br>✓  | 4<br>⚠  | 5<br>Educational Only<br>📞  |
| 6<br>✗  | 7<br>Labor Day<br>✗ | 8<br>✓  | 9<br>✓  | 10<br>✓ | 11<br>⚠ | 12<br>Educational Only<br>📞 |
| 13<br>✗ | 14<br>✓             | 15<br>✓ | 16<br>✓ | 17<br>✓ | 18<br>⚠ | 19<br>Educational Only<br>📞 |
| 20<br>✗ | 21<br>✓             | 22<br>✓ | 23<br>✓ | 24<br>✓ | 25<br>⚠ | 26<br>Educational Only<br>📞 |
| 27<br>✗ | 28<br>✓             | 29<br>✓ | 30<br>✓ | 1       | 2       | 3                           |

**Seminar marketing delivers results.**  
Seminar marketing is one of the most effective ways to fill your pipeline with high-intent prospects. In fact, the Kitces 2024 Marketing Survey found that seminars generate some of the highest revenue per new client and are a key driver of growth for high-performing practices. Nearly 20% of clients find their advisors through educational events, making seminars a proven strategy for building trust and credibility.

Success depends on several factors, but one often-overlooked element is creating a long-term strategy. This includes choosing the right mix of direct mail and digital marketing, determining whether dinner events, educational events, or both work best, and selecting topics that resonate with your target audience. A seasoned AcquireUp Marketing Consultant can help you build a strategy that combines these elements to deliver both immediate results and sustained growth.

Notes

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Dates

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Lunch Events  
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Not  
Recommended

# October 2026



| Sun     | Mon                                                | Tue     | Wed     | Thu     | Fri     | Sat                         |
|---------|----------------------------------------------------|---------|---------|---------|---------|-----------------------------|
| 27      | 28                                                 | 29      | 30      | 1<br>✓  | 2<br>!  | 3<br>Educational Only<br>📞  |
| 4<br>✗  | 5<br>✓                                             | 6<br>✓  | 7<br>✓  | 8<br>✓  | 9<br>!  | 10<br>Educational Only<br>📞 |
| 11<br>✗ | 12<br>Columbus Day<br>Indigenous Peoples' Day<br>📞 | 13<br>✓ | 14<br>✓ | 15<br>✓ | 16<br>! | 17<br>Educational Only<br>📞 |
| 18<br>✗ | 19<br>✓                                            | 20<br>✓ | 21<br>✓ | 22<br>✓ | 23<br>! | 24<br>Educational Only<br>📞 |
| 25<br>✗ | 26<br>✓                                            | 27<br>✓ | 28<br>✓ | 29<br>✓ | 30<br>! | 31<br>Halloween<br>✗        |

**Estate Planning Awareness Month**— With awareness at its peak, it's an opportune time for estate planning seminars that spark meaningful conversations.

## Gain a true understanding of your target audience.

Dive into the details of your target prospects. Research their needs, preferences, and behaviors to craft more effective campaigns and convert them more easily, or partner with a trusted marketing firm for expert guidance and insight.

## Build a brand that resonates.

Start by identifying what your clients and prospects value most, weave those priorities into your services, and shape your brand around them. This not only strengthens client relationships, but also attracts more like-minded prospects, amplifying your growth.

## Notes

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Dates



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# November 2026



| Sun                           | Mon    | Tue                   | Wed                    | Thu                        | Fri                    | Sat                        |
|-------------------------------|--------|-----------------------|------------------------|----------------------------|------------------------|----------------------------|
| 1<br>Daylight Saving Ends<br> | 2<br>  | 3<br>Election Day<br> | 4<br>                  | 5<br>                      | 6<br>                  | 7<br>Educational Only<br>  |
| 8<br>                         | 9<br>  | 10<br>                | 11<br>Veterans Day<br> | 12<br>                     | 13<br>                 | 14<br>Educational Only<br> |
| 15<br>                        | 16<br> | 17<br>                | 18<br>                 | 19<br>                     | 20<br>                 | 21<br>Educational Only<br> |
| 22<br>                        | 23<br> | 24<br>                | 25<br>                 | 26<br>Thanksgiving Day<br> | 27<br>Black Friday<br> | 28<br>Educational Only<br> |
| 29<br>                        | 30<br> | 1                     | 2                      | 3                          | 4                      | 5                          |

**Don't compete with the holidays.**  
Try to avoid scheduling events directly before or after major holidays. For November and December, aim to hold your events early in the month. This ensures ample time to engage attendees and complete the appointment-closing process before the holiday rush.

Notes

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# December 2026



| Sun     | Mon     | Tue     | Wed     | Thu                       | Fri                       | Sat                         |
|---------|---------|---------|---------|---------------------------|---------------------------|-----------------------------|
| 29      | 30      | 1<br>✓  | 2<br>✓  | 3<br>✓                    | 4<br>Chanukah Begins<br>! | 5<br>Educational Only<br>☎  |
| 6<br>✗  | 7<br>✓  | 8<br>✓  | 9<br>✓  | 10<br>✓                   | 11<br>!                   | 12<br>Educational Only<br>☎ |
| 13<br>✗ | 14<br>✓ | 15<br>✓ | 16<br>✓ | 17<br>✓                   | 18<br>!                   | 19<br>Educational Only<br>☎ |
| 20<br>✗ | 21<br>✗ | 22<br>✗ | 23<br>✗ | 24<br>Christmas Eve<br>✗  | 25<br>Christmas Day<br>✗  | 26<br>Educational Only<br>✗ |
| 27<br>✗ | 28<br>☎ | 29<br>☎ | 30<br>✗ | 31<br>New Year's Eve<br>✗ | 1                         | 2                           |

**Year-End Planning–**  
Deadlines and reflection make December prime for seminars on tax strategies, retirement moves, and legacy planning.



**Scan Now**  
To Plan Ahead

Phone  
800-771-9898

Email  
Info@acquireup.com

Ask about our omni-channel marketing campaigns for maximum reach.

## Notes

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# January 2027



| Sun     | Mon                    | Tue     | Wed     | Thu     | Fri                      | Sat                         |
|---------|------------------------|---------|---------|---------|--------------------------|-----------------------------|
| 27      | 28                     | 29      | 30      | 31      | 1<br>New Year's Day<br>⊗ | 2<br>Educational Only<br>📞  |
| 3<br>⊗  | 4<br>👑                 | 5<br>👑  | 6<br>👑  | 7<br>👑  | 8<br>⚠️                  | 9<br>Educational Only<br>📞  |
| 10<br>⊗ | 11<br>👑                | 12<br>👑 | 13<br>👑 | 14<br>👑 | 15<br>⚠️                 | 16<br>Educational Only<br>📞 |
| 17<br>⊗ | 18<br>MLK Jr. Day<br>📞 | 19<br>👑 | 20<br>👑 | 21<br>👑 | 22<br>⚠️                 | 23<br>Educational Only<br>📞 |
| 24<br>⊗ | 25<br>👑                | 26<br>👑 | 27<br>👑 | 28<br>👑 | 29<br>⚠️                 | 30<br>Educational Only<br>📞 |
| 31<br>⊗ | 1                      | 2       | 3       | 4       | 5                        | Excellent Dates<br>👑        |

**Leverage a seminar marketing firm specialized in the financial industry.**

Motivating quality prospects to respond isn't easy. Attempting to go it alone is like a client trying to create their own financial plan—it rarely works in the long run. Success might happen once, but consistency requires specialized knowledge and expertise.

With nearly 40 years of experience and a proven track record of driving over \$34B in assets to our clients' seminars monthly, we know what works—and what doesn't—so you can maximize your results and grow your business with confidence.

## Notes

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