

SEASONAL MARKETING CALENDAR
Q1: JANUARY - MARCH



JAN

RETIREMENT &
ESTATE PLANNING

Consumers start the year with resolutions and to achieve better financial planning habits. There's no time like the present to start planning for the future.

OTHER TIMELY TOPICS

- Social Security
- Estate Planning

MAR

TAX SEASON

Don't let March go by without talking about Taxes! Many consumers file last minute or request extensions and will be thinking about how to spend (or save!) their return.

OTHER TIMELY TOPICS

- Identity Protection
- Insurance

Q1 HIGHLIGHT: SAVINGS

The first quarter of the year sees peaks in interest around savings and retirement. Many consumers want to start the year out on strong financial footing and seek resources to help them do so.

FEB

BUILDING EMERGENCY
SAVINGS

It's important to set aside money for the unexpected. Inspire your consumers to make this a priority in the new year.

OTHER TIMELY TOPICS

- Budgeting Tool
- Savings

IMPORTANT DATES

America Saves/Military Saves Week
February

National Consumer Protection Week
March

Global Money Week
March

SEASONAL MARKETING CALENDAR
Q2: APRIL - JUNE



APR

CREDIT SCORES & REPORTS

Having good credit is critical to achieving financial wellness. Help consumers understand how to keep their scores healthy so that they are prepared to make their next big purchase.

OTHER TIMELY TOPICS

- Checking Accounts
- Credit Cards

JUN

MORTGAGES

Home prices peak this month, which tends to see the largest number of offers all year. This presents the perfect opportunity to share critical mortgage education with buyers.

OTHER TIMELY TOPICS

- Mortgage Modifications
- Financing Higher Ed

Q2 HIGHLIGHT: HOMEBUYING

The second quarter sees mortgage applications heating up along with the weather. Prepare your consumers for what will likely be the biggest purchase of their lives.

CONSIDERING HOME OWNERSHIP

MAY

Potential new homebuyers start to flood the market this time of year. This is an ideal time to educate consumers about buying and borrowing options.

OTHER TIMELY TOPICS

- 529 Plans
- Budgeting Tool

IMPORTANT DATES

Financial Literacy Month
April

National Employee Benefits Day
April

529 DAY
May 29th

FAFSA Deadline
June 30th

SEASONAL MARKETING CALENDAR
Q3: JULY - SEPTEMBER



JUL

AUTO LOANS

Car sales spike in the summer months and cool down when winter comes around. Make sure both first-time and experienced buyers are provided with the knowledge needed to make a good financial decision.

OTHER TIMELY TOPICS

- Insurance
- Credit Scores

Q3 HIGHLIGHT: SUMMER SPENDING

The third quarter of the year sees lots of spending - on travel, cars, and education. Loans help make these purchases attainable for your consumers, and they're looking for resources to take the first step!

CHECKING ACCOUNTS

AUG

More new checking accounts are opened in August than any other time of the year. Leverage this seasonal trend by delivering timely, relevant education to your consumers.

OTHER TIMELY TOPICS

- Payday Loans
- Credit Cards

SEP

FINANCING HIGHER EDUCATION

Many students and families are thinking about college during back to school season - and tuition is a critical part of that conversation. Help families understand their payment options so they can start planning now!

OTHER TIMELY TOPICS

- 529 Plans
- Investments

IMPORTANT DATES

Back to School
August

Labor Day Weekend Auto Sales
First Weekend of September



SEASONAL MARKETING CALENDAR Q4: OCTOBER - DECEMBER



CompanyName
PLACEHOLDER

OCT

MOBILE PAYMENTS

As the holiday season begins, consumers will want fast and easy payment options. Mobile payments offer more convenience and security by enabling purchases via mobile devices.

OTHER TIMELY TOPICS

- Overdraft
- Prepaid Cards

DEC

INVESTMENTS

December is a great time to review year-end finances and put holiday bonuses to work! Learning basic investment concepts can help consumers reach both short and long-term financial goals.

OTHER TIMELY TOPICS

- Building Emergency Savings
- When to Collect Social Security

Q4 HIGHLIGHT: HOLIDAY SPENDING

All of the shopping, celebrations, and travel during the holidays can make managing finances difficult. According to the National Retail Federation, the average person spends over \$800 during the holiday season.

IDENTITY PROTECTION

NOV

During high-spending seasons, identity theft and consumer fraud are widespread. Digital education is an impactful way to support consumers in these situations of financial crisis.

OTHER TIMELY TOPICS

- Credit Cards
- Credit Scores

IMPORTANT DATES

International Credit Union Day
October

FAFSA Application Opens
October

Get Smart About Credit Day
October

Small Business Saturday
Saturday after Thanksgiving