

The Financial Advisor's Marketing Calendar

A large, 3D-rendered red number "2016" with a slight shadow and reflection on a white surface below it.

2016

A complete year of financial deadlines, special observances, holidays, and communication themes for contacting clients, prospects & COIs.

Financial Advisor's 2016 Marketing Calendar

Need a reason to reach out and touch clients, prospects, and centers of influence? Maybe a new idea for a client event or some interesting content for your monthly newsletter?

The 2016 Financial Advisor's Marketing Calendar offers hundreds of authentic, non salesy ideas for getting close to all your stakeholders. It lists a variety of commonly observed holidays, financial dates, and deadlines, as well as hundreds of "special days" both fun and charitable that can inspire your marketing and cultivate rewarding relationships.

The following holidays, deadlines, and special observances were chosen from thousands available. While every attempt was made to check all dates with multiple sources, we do not warrant or guarantee accuracy. Nor is this an exhaustive list. There are special observances for almost every niche or charitable concern so if you can't find what you're looking for in this calendar, check out the List of Resources on page 15 for a whole world of special occasions!

Have a Great Year!!

January

Commonly Observed Holidays

- Jan 1. New Year's Day (markets closed)
- Jan 18. Martin Luther King Day (markets closed)

Financial Dates & Observances

- Jan 1. Medicare Advantage dis-enrollment period opens
- Jan 1. FAFSA 2016-2017 opens
- Jan 15. 4Q 2015 estimated taxes due
- Jan 31. 2016 Health Care enrollment ends

Business & Industry

- Jan 12. Pharmacists Day
- Jan 24-30. Nurse Anesthetists Week
- Jan 24-29. Tax Identity Theft Week
- Jan 25-29. Medical Group Practice Week
- Jan 31-Feb 6. Catholic Schools Week

Cause Observances

- Blood Donor Month
- Financial Wellness Month
- Mentoring Month

- Jan 8. War on Poverty Day
- Jan 10. Cut Your Energy Costs Day
- Jan 18-22. No Name Calling Week
- Jan 27. Holocaust Memorial Day



Special Observances

- Book Blitz Month
- Brainteaser Month
- Celebration of Life Month
- Get Organized Month
- Sunday Supper Month

- Jan 2. Science Fiction Day
- Jan 11. College Football Championship
- Jan 11. Clean Off Your Desk Day
- Jan 12. Poetry at Work Day
- Jan 17. Hot Buttered Rum Day
- Jan 19. Popcorn Day
- Jan 21. Hugging Day
- Jan 23. Pie Day
- Jan 24. Compliment Day
- Jan 28. Data Privacy Day

February

Commonly Observed Holidays

- Feb 8. Chinese New Year
- Feb 10. Ash Wednesday
- Feb 14. Valentines Day
- Feb 15. President's Day (markets closed)

Financial Dates & Observances

- Feb 1. All W-2s, most 1099s due
- Feb 14. Medicare Advantage Plans
Disenrollment closes

Business & Industry

- Feb 11. Pro-Sports Wives Day
- Feb 12. NAACP Founders Day
- Feb 20-27. Entrepreneurship Week
- Feb 21-27. Engineers Week
- Feb 21-27. FFA Week
- Feb 22-27. America Saves Week

Cause Observances

- American Heart Month
- Black History Month
- Senior Independence Month
- Wise Health Care Consumer Month
- Youth Leadership Month

- Feb 1. Freedom Day
- Feb 1-7. Women's Heart Week
- Feb 4. Rosa Park's Day
- Feb 5. Wear Red Day
- Feb 8. Boy Scout Anniversary Day
- Feb 11. Shut-in Visitation Day
- Feb 14. Autism Sunday
- Feb 16. Kyoto Protocol Day



Special Observances

- Bird Feeding Month
- Library Lovers Month
- Responsible Pet Owners Month
- Spunky Old Broads Month
- Time Management Month

- Feb 1. Car Insurance Day
- Feb 2. Groundhog Day
- Feb 4. Thank a Mailman Day
- Feb 5. Shower With a Friend Day
- Feb 7. Super Bowl 50
- Feb 8. Laugh and Get Rich Day
- Feb 9. Mardi Gras
- Feb 12. Lincoln's Birthday
- Feb 15-16. Westminster Dog Show
- Feb 18. Drink Wine Day
- Feb 22. Daytona 500
- Feb 28. Academy Awards
- Feb 29. Leap Day

March

Commonly Observed Holidays

Mar 13. Daylight Savings Time begins
Mar 17. St. Patrick's Day
Mar 23-24. Purim
March 25. Good Friday (markets closed)
March 27. Easter

Financial Dates & Observances

Mar 1. FAFSA deadline closes in some states
Mar 15. 2015 S-Corp returns due (cal yr)
Mar 15. 2015 C-Corp returns due (cal yr)

Business & Industry

Mar 4. Employee Appreciation Day
Mar 6. Dentists Day
Mar 6-12. Women in Construction Week
Mar 9. Registered Dietitian Day
Mar 13-19. Agriculture Week
Mar 19. Certified Nurses Day
Mar 26 Legal Assistants Day
Mar 29. Mom & Pop Business Owner Day
Mar 30. Doctors Day

Cause Observances

American Red Cross Month
Credit Education Month
Music In Our Schools Month
Nutrition Month
Women's History Month

Mar 6-12. Consumer Protection Week
Mar 6-12. Girl Scout Week
Mar 10. Salvation Army Day
Mar 14-20. Wildlife Week
Mar 16. Kick Butts Day
Mar 22. World Water Day
Mar 22. American Diabetes Alert Day

Special Observances

Clean Up Your IRS Act Month
Craft Month
Irish-American Heritage Month

Mar 1. Refired, Not Retired Day
Mar 6. Oreo Cookie Day
Mar 14. Napping Day
Mar 15. Ides of March
Mar 15-Apr 4. March Madness
Mar 20. First Day of Spring
Mar 20-26. American Chocolate Week
Mar 31. Cesar Chavez Day



April

Commonly Observed Holidays

Apr 22-30. Passover

Financial Dates & Observances

Apr 1. Last day of grace period for first IRA required minimum distribution

Apr 18. 2015 individual tax returns due

Apr 18. 2015 partnership returns due

Apr 18. 2015 trust & estate returns due

Apr 18. 1Q 2016 estimated taxes due

Apr 18. Last day to open IRA for 2015

Apr 18. Last day to contribute to Coverdell Education Savings Account for 2015

Apr 18. Last day to contribute to IRA for 2015

Apr 18. Last day to contribute to profit sharing plans for 2015 (unless extension filed)

Apr 18. Last day to contribute to HSAs for 2015



Cause Observances

Alcohol Awareness Month

Autism Awareness Month

Financial Literacy Month

Keep America Beautiful Month

Parkinson's Awareness Month

Apr 2. World Autism Day

Apr 7. World Health Day

Apr 10-16. Library Week

Apr 11-15. Retirement Planning Week

Apr 16. Health Care Decisions Day

Apr 22. Earth Day

Apr 23-30. Money Smart Week

Business & Industry

Inventor's Month

Apr 6. Paraprofessional Appreciation Day

Apr 12. Be Kind to Lawyers Day

Apr 24-30. Administrative Professionals Week

Apr 25. Plumbers Day

Apr 27. Administrative Professionals Day

Special Observances

Car Care Month

Garden Month

Jazz Appreciation Month

Poetry Month

Apr 1. April Fool's Day

Apr 1. National Walk to Work Day

Apr 4. NCAA Men's Basketball Championship

Apr 4-10. The Masters Tournament

Apr 6. New Beers Eve

Apr 11. Pet Day

Apr 16. Husband Appreciation Day

Apr 17-23. Coin Week

Apr 18. Boston Marathon

Apr 18. Golf Day

Apr 20. Pot Smokers Day

Apr 28. Take Your Child to Work Day

Apr 29. Teach Your Children to Save Day

May

Commonly Observed Holidays

- May 5. Cinco de Mayo
- May 8. Mother's Day
- May 23. Victoria Day (CA)
- May 30. Memorial Day (markets closed)

Financial Dates & Deadlines

- May 15. 2015 non-profit returns due

Business & Industry

Military Appreciation Month

- May 1. School Principals' Day
- May 1-7. Small Business Week
- May 2-6. Teacher Appreciation Week
- May 3. Teacher Appreciation Day
- May 6. Nurses Day
- May 6. Military Spouse Appreciation Day
- May 8-14. Hospital Week
- May 8-14. Police Week
- May 11. Receptionists Day
- May 15-21. Transportation Week
- May 16. Accounting Day
- May 21. Armed Forces Day

Cause Observances

- ALS Awareness Month
- Arthritis Awareness Month
- Clean Air Month
- Family Wellness Month
- Mental Health Month
- Social Security Education Awareness Month

- May 1-7. Be Kind to Animals Week
- May 5. Holocaust Remembrance Day
- May 5. National Day of Prayer
- May 10. World Lupus Day
- May 11. Donate a Day's Wages to Charity
- May 18. Employee Health & Fitness Day
- May 25. Senior Health & Fitness Day



Special Observances

- Bike Month
- Golf Month
- Hamburger Month
- Older Americans Month

- May 1. Stepmother's Day
- May 2-8. Wildflower Week
- May 7. Kentucky Derby
- May 8. VE Day, WWI
- May 8. No Socks Day
- May 12. Limerick Day
- May 15. National Chocolate Chip Day
- May 20. NASCAR Day
- May 21. Preakness Stakes
- May 21-27. Safe Boating Week
- May 29. Indianapolis 500

June

Commonly Observed Holidays

Jun 6. Beginning of Ramadan
Jun 19. Juneteenth
Jun 19. Father's Day

Financial Dates & Deadlines

Jun 15. 2Q 2016 estimated taxes due
Jun 15. Last day for US citizens living
abroad to file returns
Jun 30. FAFSA closes

Business & Industry

Entrepreneurs "Do It Yourself" Month
Dairy Month

Jun 1. Tailor's Day
Jun 12-18. Nursing Assistants Week
Jun 14. Army Birthday
June 30. Social Media Day

Cause Observances

Black Music Month
Gay & Lesbian Pride Month
Men's Health Month
National Safety Month
Oceans Month

Jun 5. Cancer Survivors Day
Jun 5-11. Black Single Parents Week
Jun 13-19. Men's Health Week
Jun 14. World Blood Donor Day
Jun 19-25 Animal Rights Awareness Week
Jun 23. Public Service Day



Special Observances

Camping Month
Candy Month
Great Outdoors Month
Steakhouse Month
Women's Golf Month

Jun 1. Running Day
Jun 2. Bubba Day
Jun 3. Doughnut Day
Jun 6. D-Day, WWII
Jun 11. Belmont Stakes
Jun 10-12. Lemonade Days
Jun 14. Flag Day
Jun 13-19. U.S. Open Golf Championship
Jun 21. Selfie Day
Jun 27-Jul 10. Wimbledon Tennis
Jun 21. Baby Boomers Recognition Day

July

Commonly Observed Holidays

Jul 1. Canada Day (CA)
Jul 4. Independence Day
Jul 5. End of Ramadan

Financial Dates & Deadlines

Jul 31. Form 5500 due

Business & Industry

Independent Retailer Month

Jul 29. System Administrator Appreciation Day
Jul 31. World Ranger Day

Cause Observances

Black Family Month
Make a Difference to Children Month
Park and Recreation Month
Sandwich Generation Month

Jul 11. World Population Day
Jul 18. Nelson Mandela Day



Special Observances

Cell Phone Courtesy Month
Family Golf Month
Grilling Month
Hot Dog Month
Ice Cream Month

Jul 2-24. Tour de France
Jul 4. National BBQ Day
Jul 6. Take Your Webmaster to Lunch Day
Jul 6. Fried Chicken Day
Jul 8. Collector Car Appreciation Day
Jul 9-10. Wimbledon Finals
Jul 14. Bastille Day
Jul 18-21. Republican Convention
Jul 20-24. Comic Con
Jul 25-28. Democratic Convention
Jul 23. Gorgeous Grandma Day
Jul 24. Tequila Day
Jul 24. Parents Day
Jul 30. National Dance Day
Jul 30. Father-in-Law Day

August

Commonly Observed Holidays

Aug 1. Civic Holiday (CA)

Financial Dates & Deadlines

none

Business & Industry

Black Business Month

Aug 1. US Air Force Day

Aug 4. Coast Guard Day

Aug 18-24. Minority Enterprise Development
Week

Aug 27. Franchise Appreciation Day

Aug 31. Love Litigating Lawyers Day

Cause Observances

American Indian Heritage Month

Boomers Making a Difference Month

Water Quality Month

Aug 4. Social Security Day



Special Observances

American Artists Appreciation Month

Golf Month

What Will Be Your Legacy Month

Aug 3. Watermelon Day

Aug 4. Social Security Day

Aug 5-21. Summer Olympics

Aug 7. Kids Day

Aug 8-14. Sturgis Rally

Aug 9. Book Lovers Day

Aug 10-16. Elvis Week

Aug 13. Garage Sale Day

Aug 19. Aviation Day

Aug 21. Senior Citizens Day

Aug 26. Dog Day

Aug 26. Women's Equality Day

Aug 29. US Open Tennis begins

Aug 30. Toasted Marshmallow Day

September

Commonly Observed Holidays

- Sep 5. Labor Day (markets closed)
- Sep 5. Labour Day (CA)

Financial Dates & Deadlines

- Sep 15. 3Q 2016 estimated taxes due
- Sep 15. 2015 Extended partnership returns due
- Sep 15. 2015 Extended S-corp returns due
- Sep 15. Extended 2015 C-corp returns due
- Sep 30. 2015 Extended trust & estate returns due
- Sep 30. Last day to determine beneficiaries after IRA owner's death

Business & Industry

- Sep 18. Air Force Birthday
- Sep 20. IT Professionals Day
- Sep 29. VFW Day

Cause Observances

- Baby Safety Month
- Childhood Cancer Awareness Month
- Hispanic Heritage Month (Sep 15-Oct 15)
- Prostate Cancer Awareness Month
- September Is Healthy Aging Month

- Sep 7. Attention Deficit Disorder Awareness Day
- Sep 11-17. Assisted Living Week
- Sep 11. Patriot Day
- Sep 17. Constitution/Citizenship Day
- Sep 27. Family Health & Fitness Day

Special Observances

- College Savings Month
- Happy Cat Month
- Intergeneration Month
- Self Improvement Month

- Sep 10-11. U.S. Open Finals (tennis)
- Sep 11. Grandparents Day
- Sep 12-17. Line Dance Week
- Sep 16. Stepfamily Day
- Sep 18. Cheeseburger Day
- Sep 19. Talk Like a Pirate Day
- Sep 20-26. Dog Week
- Sep 22. Ice Cream Cone Day
- Sep 24. Museum Day
- Sep 28. Drink Beer Day



October

Commonly Observed Holidays

- Oct 2-4. Rosh Hashanah
- Oct 11-12. Yom Kippur
- Oct 10. Columbus Day (markets open)
- Oct 10. Thanksgiving (CA)
- Oct 31. Halloween

Financial Dates & Deadlines

- Oct 1. Final deadline for self-employed & small businesses to establish SIMPLE IRA for 2016
- Oct 17. 2015 Extended individual tax returns due
- Oct 17. Medicare open enrollment begins
- Oct 17. Health care open enrollment begins
- Oct 17. Last day to recharacterize 2015 Roth IRA conversion
- Oct 17. Final deadline to fund SEP or solo 401(k) for extended 2015



Cause Observances

- AIDS Awareness Month
- Breast Cancer Awareness Month
- Bullying Prevention Month
- Health Literacy Month

- Oct 2-8. 4-H Week
- Oct 9. Clergy Appreciation Day
- Oct 9-15. Fire Prevention Week
- Oct 24. United Nations Day

Business & Industry

- Pharmacists Month
- Oct 3-7. Customer Service Week
- Oct 6-12. Physicians Assistant Week
- Oct 9-15. Emergency Nurses Week
- Oct 13. Navy Birthday
- Oct 16-22. Business Women's Week

Special Observances

- Cyber Security Awareness Month
- Financial Planning Month
- Long-term Care Planning Month
- Organize Your Medical Information Month
- Oct 3. Techies Day
- Oct 3-9. Great Books Week
- Oct 3-9. Financial Planning Week
- Oct 4. Taco Day
- Oct 12. Take Your Parents to Lunch Day
- Oct 17. Boss's Day
- Oct 17-23. Estate Planning Awareness Week
- Oct 17-21. Save for Retirement Week
- Oct 19. Support Your Local of Chamber of Commerce Day
- Oct 23. Mother-in-Law Day
- Oct 29. World Series starts (baseball) (tentative)

November

Commonly Observed Holidays

- Nov 6. Daylight Savings Time ends
- Nov 11. Veterans Day
- Nov 11. Remembrance Day (CA)
- Nov 24. Thanksgiving Day (markets closed)
- Nov 25. Markets close at 1 p.m. ET

Financial Dates & Deadlines

- Nov 30. Last day for doubling up to avoid wash sale rule

Business & Industry

- Military Family Appreciation Month
- Entrepreneurship Month

- Nov 4. Love Your Lawyer Day
- Nov 10. Marine Corps Birthday
- Nov 13-19. Nurse Practitioners Week
- Nov 14. Operating Room Nurse Day
- Nov 26. Small Business Saturday

Cause Observances

- Adoption Month
- Alzheimer's Month
- American Diabetes Month
- American Indian Heritage Month
- Family Caregivers Month
- Lung Cancer Awareness Month

- Nov 1. Family Caregiver Day
- Nov 15. Philanthropy Day
- Nov 17. Great American Smokeout
- Nov 20. Child Day (CA)



Special Observances

- Long-Term Care Awareness Month
- Vegan Month

- Nov 1. Dia de los Muertos (Day of the Dead)
- Nov 3. Men Make Dinner Day
- Nov 6-7. NYC Marathon
- Nov 8. Presidential Election Day
- Nov 15. America Recycles Day
- Nov 20-26. Family Week
- Nov 25. Black Friday
- Nov 28. Cyber Monday
- Nov 29. Square Dancing Day
- Nov 30. Computer Security Day

December

Commonly Observed Holidays

Dec 24-Jan 1. Hanukah
Dec 25. Christmas Day
Dec 26. Christmas observed (markets closed)
Dec 26-Jan 1. Kwanzaa
Dec 26. Boxing Day (CA)
Dec 31. New Year's Eve

Special Observances

Write a Business Plan Month

Dec 1. Christmas Tree Lighting (DC)
Dec 5-9. Cookie Exchange Week
Dec 6. St. Nicholas Day
Dec 7. Pearl Harbor Day
Dec 15. Bill of Rights Day
Dec 16. Ugly Christmas Sweater Day
Dec 26. Thank-You Note Day
Dec 30. Bacon Day

Cause Observances

Operation Santa Paws
Safe Toys and Gifts Month

Dec 4. World Wildlife Conservation Day
Dec 5-9. Older Driver Safety Week
Dec 10. Wreaths Across America Day
Dec 10-17. Human Rights Week
Dec 16. Zionism Day
Dec 17. Clean Air Day



Financial Dates & Deadlines

Dec 7. Medicare open enrollment period closes

Dec 31. Last day to:

- Establish Keogh plan
- Establish solo 401(k)
- Make contributions to 401(k) plans
- Correct excess contributions
- Sell stock to realize gains/losses
- Take RMDs
- Last day to pay expenses for itemized deductions
- Make tax-deductible contribution to charities
- Make annual tax-free gifts

Resources

- Brownielocks Holidays and Observances (<http://www.brownielocks.com>)
- Days of the Year (<https://www.daysoftheyear.com/days/2016/01/>)
- National Day Calendar (<http://nationaldaycalendar.com/calendar-at-a-glance/>)
- Holiday Insights (<http://www.holidayinsights.com/>)
- NYSE Holidays, Stock Market Holidays (<https://www.nyse.com/markets/hours-calendars>)
- IRS (<http://www.irs.gov>)
- FAFSA deadlines (<http://www.fafsa.ed.gov/>)
- Healthcare.gov (<https://www.healthcare.gov/quick-guide/dates-and-deadlines/>)
- National Health Observances (<http://healthfinder.gov/nho/default.aspx>)
- U.S. Federal Holidays (<http://www.redcort.com/us-federal-bank-holidays>)
- And more...

Disclaimers

- Only includes nationally recognized observed holidays.
- Only includes significant religious holidays of major religions practiced in North America.
- Does not include state holidays.
- We have made every attempt possible to be accurate in listing these holidays, but we guarantee nothing.
- No discrimination towards gender, ethnicity, religion, politics, or anything else intended.
- This calendar was prepared to give financial advisors ideas for possible marketing activities.
- The calendar is intended to be informative, educational, and fun.
- Suggestions, corrections, and comments welcome. Please send to advisorcalendar@horsesmouth.com.