



Investment
Management



ADVISOR ADVANCEMENT INSTITUTE

2026 Client Outreach Opportunities



Engage

Your Clients and Prospects

Maximize relationships. Increase engagement.

AI. Blogs. Podcasts. There's no shortage of places to get financial information. In this environment, advisors need to show value to their clients beyond products and performance. Building relationships, that human connection, is what often makes the difference. In fact, our studies show that in order to get high satisfaction ratings from clients, advisors need to proactively communicate about 25 times a year.

That's why we created the 2026 Client Outreach Calendar, designed to help you engage with clients and prospects in meaningful ways. From hosting timely events, giving thoughtful gifts, or just reaching out in unexpected ways, you can build those relationships and show you care about them. This calendar includes Pro Tips throughout the month to inspire ways in which you can interact with clients. 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

National Puzzle Day January 29

Celebrate National Puzzle Day by sending clients a puzzle or brain teaser with a note: *"Let's get the right pieces together for your 2026 financial plan."* It's a fun way to connect while reinforcing the value of planning early in the year.

2026 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 Science Fiction Day	3	Month National Mentoring Month Financial Wellness Month Thank You Month
4	5	6	7	8	9	10	Week 11th - 17th National Mocktail Week 11th - 17th National Pizza Week 11th - 17th Universal Letter Writing Week
Trivia Day Spaghetti Day	National Bird Day				Law Enforcement Day	Cut Your Energy Costs Day	
11	12	13	14	15	16	17	
	National Pharmacists' Day Clean Off Your Desk Day	Make Your Dreams Come True Day	Organize Your Home Day	Get to Know Your Customers Day National Hat Day		Kid Inventors' Day International Mentoring Day	
18	19	20	21	22	23	24	
	Martin Luther King Jr. Day			Hot Sauce Day	Pie Day	Compliment Day	
25	26	27	28	29	30	31	
	Spouse Day			Lunar New Year Puzzle Day	Fun at Work Day		

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



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February is a short month but offers plenty of opportunities to connect with your clients in a warm way. Between the big game and other events, it's a great time to spark conversations that are both informative and fun.

This month, focus on engagement through:

- Education
- Sports
- Food & Drink
- Client Appreciation

Pro Tip

Super Bowl Sunday February 8

Pick a day in early February and reach out to clients in engaging ways with activities and items tied to the big game. Provide the game day snacks with a personal note.

2026 February | Client Outreach Opportunities

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

Financial Education	Health & Fitness	Food & Drink	Sports	Environmentally Friendly	Client Appreciation	Seasonal & Holiday	Charity/Philanthropy	Miscellaneous
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They say March comes in like a lion and goes out like a lamb. Conditions are perfect for both education and appreciation, giving clients the tools and confidence needed to shape their financial future.

This month, focus on engagement through:

- Education
- Networking
- Client Appreciation



Pro Tip

International Women's Day March 8

Celebrate and empower women investors by hosting a "Women & Wealth" event in person or virtual. Highlight strategies for investing with confidence, create space for women to talk about their concerns, and provide resources to help support them.

2026 March | Client Outreach Opportunities

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

Financial Education	Health & Fitness	Food & Drink	Sports	Environmentally Friendly	Client Appreciation	Seasonal & Holiday	Charity/Philanthropy	Miscellaneous
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April is a time of new growth and renewal. For clients, it can be an ideal time to revisit their portfolios and explore strategies designed to keep them on track toward reaching their goals. So spring into action and engage with prospects and established clients!

This month, focus on engagement through:

- Financial Education
- Activities
- Client Appreciation



Pro Tip

Financial Literacy Month

Celebrate Financial Literacy Month by hosting a client event discussing the basics of finance. Send notebooks or pens as prizes, reinforcing the theme of lifelong financial growth and learning. It's a tangible reminder of your role as their financial guide.

2026 April | Client Outreach Opportunities

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

Financial Education	Health & Fitness	Food & Drink	Sports	Environmentally Friendly	Client Appreciation	Seasonal & Holiday	Charity/Philanthropy	Miscellaneous
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May brings sunnier days and warmer weather. It's a time to gather and reconnect. Contact new and established clients and jumpstart a conversation about their financial journey. Whether they are thinking of expanding their portfolio or diversifying, offer up new ideas on how to reach their goals.

This month, focus on engagement through:

- Sports
- Food & Drink
- Client Appreciation

Pro Tip

Kentucky Derby May 2

Mark the excitement of the Derby by hosting a watch party or sending clients a Derby themed gift—think mint julep kits, racing guides, or even a playful hat and bow tie. Bring it back to finances with a message like: *“We’ll help keep you on track to reach your financial goals.”*

2026 May | Client Outreach Opportunities

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
					1	2	Month
					School Principal's Day	Kentucky Derby International Harry Potter Day	Family Wellness Month Barbecue Month Jewish American Heritage Month Military Appreciation Month Mental Health Awareness Month
3	4	5	6	7	8	9	Week
	National Lemonade Day Star Wars Day Self-Employed Day	Teacher's Appreciation Day Cinco De Mayo			National Student Nurse Day		3rd - 9th Small Business Week 4th - 8th Teacher Appreciation Week
10	11	12	13	14	15	16	
Mother's Day National Golf Day	PGA Championship	International Nurses Day	National Receptionists Day World Cocktail Day		Endangered Species Day National Pizza Party Day International Day of Families	Armed Forces Day National Learn to Swim Day World Whisky Day FA Cup Final (Soccer) Mimosa Day	
17	18	19	20	21	22	23	
Preakness Stakes		World Baking Day	National Rescue Dog Day	International Tea Day			
24	25	26	27	28	29	30	
Indianapolis 500	Memorial Day National Wine Day			Senior Health & Fitness Day		National Creativity Day Champions League Final (Soccer)	
31							

Financial Education	Health & Fitness	Food & Drink	Sports	Environmentally Friendly	Client Appreciation	Seasonal & Holiday	Charity/Philanthropy	Miscellaneous
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Halfway through the year, June is a natural time to check in with your clients. Use the opportunity to discuss their portfolio's performance to date and suggest fresh ideas for the future. Your clients will appreciate the time you invest in them.

This month, focus on engagement through:

- Food & Drink
- Client Appreciation
- Education



Pro Tip

National Iced Tea Day June 10

Celebrate National Iced Tea Day by sending clients a refreshing iced tea kit with a note: *"Let's brew up some fresh perspectives on your investment strategy."* It's a small, seasonal touch that sets up a mid-year conversation.

2026 June | Client Outreach Opportunities

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

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July is often packed with travel, family time, and 4th of July celebrations. In spite of July being a busy month, it's still a good idea to schedule a quick "catch up" with clients. While summer days can be busy, use this month to remind your clients that you are there for them, for both their financial and life goals.

This month, focus on engagement through:

- Client Feedback
- Client Appreciation



Pro Tip

World Listening Day July 18

Invite clients to a short virtual or in-person "Feedback Forum" to celebrate World Listening Day. Ask what matters most to them in 2026. Follow up with a tailored action plan that shows that you've listened, and that is relevant to their concerns.

2026 July | Client Outreach Opportunities

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

Financial Education	Health & Fitness	Food & Drink	Sports	Environmentally Friendly	Client Appreciation	Seasonal & Holiday	Charity/Philanthropy	Miscellaneous
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Summer is coming to a close. Many kids are headed back to school, which is a perfect time to touch base with clients about saving for college. Work will be ramping back up soon, so encourage clients to think about long-term wealth strategies. Most of all, tell them to relax. You've got this!

This month, focus on engagement through:

- Lifestyle & Wellness
- Client Appreciation



Pro Tip

National Friendship Day August 2

Encourage clients to introduce a friend or family member who could benefit from your services. What better gift on National Friendship Day than the gift of financial advice from someone you trust.

2026 August | Client Outreach Opportunities

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

Financial Education	Health & Fitness	Food & Drink	Sports	Environmentally Friendly	Client Appreciation	Seasonal & Holiday	Charity/Philanthropy	Miscellaneous
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September means it's time to get back to a routine. Encourage clients and prospects to make financial planning a part of that routine. This is a good time to walk them through 401(k)s, or to discuss the benefits of asset allocation. September is a great time to reconnect with clients and discuss their plans through the end of the year.

This month, focus on engagement through:

- Client Appreciation
- Education

Pro Tip

Positive Thinking Day September 13

Ask them to think about their long-term goals and wishes. Discuss how a solid financial plan is a “positive” way to get them on the right track.

2026 September | Client Outreach Opportunities

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

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From the World Series to Halloween, there's a lot going on in October. It also marks the beginning of the 4th quarter. This is the time to plan for next year. Talk to clients and prospects about diversifying their portfolios to weather any spooky market fluctuation.

This month, focus on engagement through:

- Financial Education
- Sports & Seasonal Events



Pro Tip

World Financial Planning Day October 7

Use this global event to host a webinar or in-person session on the potential benefits of diversified investment strategies.

2026 October | Client Outreach Opportunities

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

Financial Education	Health & Fitness	Food & Drink	Sports	Environmentally Friendly	Client Appreciation	Seasonal & Holiday	Charity/Philanthropy	Miscellaneous
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With November, comes the season of gratitude. It's a natural time to let clients know that you appreciate them.

This month, focus on engagement through:

- Client Appreciation
- Charity/Philanthropy
- Food & Drink



Pro Tip

National Philanthropy Day November 15

Set up an informal pre-Thanksgiving event with treats such as warm apple cider, pies or other seasonal fare and offer a charitable-giving strategies session for maximizing deductions.

2026 November | Client Outreach Opportunities

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

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Another year is coming to an end. Clients are focused on family, celebrations, and preparing for 2027. This a great time to look at financial milestones and set a course for the new year.

This month, focus on engagement through:

- Charity/Philanthropy
- Financial Planning
- Seasonal & Holiday



Pro Tip

National Cocoa Day December 13

Use National Cocoa Day as a warm, personal touchpoint. Send clients a hot cocoa kit with a note: *“Warming up your winter—and your financial outlook.”* It’s a simple gesture that keeps you top of mind during the holidays.

2026 December | Client Outreach Opportunities

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

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

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