



# Marketing Communications Calendar

## Designed for Financial Institutions

### Automated Communications

#### Onboarding & Cross-Sell

Welcome, Account Opening Survey, Account Benefits, Financial Needs Survey, NPS Survey, Product Offers

#### Operational

Holiday Hours, Branch Updates, Core Conversion

#### Legal Notifications

Legal, Privacy Notices, Account Maturation

#### Product Utilization

Credit/Debit Card, HELOC, Dormant Accounts, Online/Mobile Banking, Lost Account Survey

#### Education

Product Info, Financial Literacy, Youth Program

#### Feel Good/Do Good

Newsletter, Birthday, Anniversary, Skip a Pay, Events, Charity

#### Maturing

Mortgage, CDs, Auto Loans, HELOC

January	February	March	April	May	June
<ul style="list-style-type: none"> <li>New Years Day</li> <li>MLK Day</li> <li>Financial Wellness Month</li> </ul>	<ul style="list-style-type: none"> <li>President's Day</li> <li>Valentine's Day</li> <li>America Saves Week</li> </ul>	<ul style="list-style-type: none"> <li>National Ag Day</li> <li>National Credit Education Month</li> </ul>	<ul style="list-style-type: none"> <li>National Financial Literacy Month</li> <li>National Teach Children to Save Month</li> <li>Tax Time</li> <li>Community Banking Month</li> </ul>	<ul style="list-style-type: none"> <li>Mother's Day</li> <li>Memorial Day</li> <li>National Small Business Week</li> <li>National College Savings Day</li> </ul>	<ul style="list-style-type: none"> <li>Father's Day</li> <li>Juneteenth</li> <li>National Homeownership Month</li> </ul>
<p>Visa Balance Transfer</p>		<p>Home Improvement / HELOC</p>		<p>Mortgages</p>	

July	August	September	October	November	December
<ul style="list-style-type: none"> <li>Independence Day</li> <li>Back to School</li> </ul>	<ul style="list-style-type: none"> <li>Back to School</li> </ul>	<ul style="list-style-type: none"> <li>Labor Day</li> <li>College Savings Month</li> </ul>	<ul style="list-style-type: none"> <li>Halloween</li> <li>Indigenous People's Day</li> <li>Customer Service Month</li> <li>International Credit Union Day</li> <li>Get Smart About Credit Day</li> </ul>	<ul style="list-style-type: none"> <li>Veteran's Day</li> <li>Thanksgiving</li> <li>Fraud Awareness Week</li> </ul>	<ul style="list-style-type: none"> <li>Christmas</li> </ul>
<p>Personal Loans</p>		<p>Auto Loans</p>		<p>Holiday Loans and Savings Accounts</p>	