Connecting with client's: calendar ideas

Regular communication is one of the best ways to build stronger, longer-lasting relationships with your clients – as long as it's relevant and helpful. This calendar is designed to help you keep up that dialogue throughout the year, with thought starters and communication ideas.

Whether it's a financed-focused event or an awareness day, these key events can be excellent trigger points for client, internal and external communications. By offering more value, staying engaged and keeping your firm top of mind between annual reviews, you can drive even more profitable practices.

Key

Bank Holidays	General/Sports	Celebration/Awareness	ESG-focused	Finance-focused

September 2023

MON	TUES	WED	THU	FRI	SAT	SUN
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September – Pension Awareness Season starts

8 September – Rugby World Cup

Runs from 8 September – 28 October.

11 September – Pension Awareness Week

Runs from 11-15 September.

This is a good time for client and external communications. Share the dos and don'ts, common mistakes, top tips, any tools people can use. If you have the data, you can also let your clients know how they're positioned versus the average for their age.

You can also highlight pension-specific events around preparing for retirement, taking retirement (including semi-retirement) and managing money in retirement.

Tap into our technical content to help with your communications.

18 September – UK Savings Week

UK Savings Week, operated and run by the Building Societies Association (BSA), runs from 18-24 September. It aims to get people engaged with saving, whether they're already savers; have no savings but could save a little; or are unable to save right now but might be able to when times improve.

Here, you can send out client and external communications, such as sharing best practice tips, healthy saving habits, top ways to save right now and different types and ways of saving.

18 September – September Inflation Announcement

The figure for September is really important, as it's used when calculating changes to benefits, the State Pension and tax credits.

Once the figures have been announced, you can send communications to clients letting them know what's happened and what it means for them.

29 September – Golf Ryder Cup

Runs from 29 September – 1 October.

29 September – Macmillan Coffee Morning

Show your support by doing an internal or external campaign to get people involved with the coffee morning.

October 2023

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October – Black History Month/Global Diversity Awareness Month

1 October – Cyber Awareness Month

Highlight the importance of financial cyber security with messaging about common scams and what to look out for.

You can find tips on staying safe online on our website.

1 October – Grandparents' Day

2 October – Good Money Week

This runs from 2-6 October as part of UKSIF (UK Sustainable Investment and Finance Association).

This is a time to talk about sustainable and ethical investing. That could be with explainers including what, why, when and how to invest sustainably, as well as the different approaches, or a spotlight on funds and companies that do ESG well.

You can find comprehensive materials on sustainable investing on our website.

5 October – Deadline to register for self-assessment

This is the deadline to register with HMRC. This applies to clients who are self-employed, sole traders or registering a partner or partnership.

Send out messages to clients reminding them in the lead-up to the deadline.

10 October – World Mental Health Day

Start an internal awareness and acceptance campaign. More generally in client and external communications, you can make the link between mental and financial health, common difficulties for those with mental health issues, and how they can act to support their financial wealth. There may also be partnership opportunities with charities or related organisations.

Tap into our technical content on pensions to help with your communications.

10 October – World Pension Summit

Runs from 10-12 October.

An opportunity internally to share new thinking and developments in the industry, here and globally. Externally, a chance to share news and nudge people to pay attention to their pension. If not for the client, for their wider family.

31 October – Postal self-assessment tax deadline

November 2023

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November – Autumn Statement

6 November – Talk Money Week

Runs from 6-10 November. It's an opportunity for everyone to get involved with events and activities across the UK, designed to help people have more open conversations about their money.

There's an opportunity here for both internal and external messaging. Hook ideas can be based on different life stages, genders or family situations.

You could also: repackage content from the TMW site; conduct polls and surveys on social media about difficult/positive money conversations and share the results; share examples of interesting 'money communities' for people to join and learn more.

11 November – Remembrance Day

12 November – Remembrance Sunday

19 November – International Men's Day

30 November – 2023 UN Climate Change Conference (COP28)

Runs from 30 November – 12 December.

At this time you can make a link to sustainable investing in your communications.

You can find comprehensive materials on sustainable investing on our website.

December 2023

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December – Beginning of winter, beginning of the holiday festive season

2 December – Small Business Saturday UK

A chance to celebrate small business owners in local communities. A chance to weave in statistics about the state of small business owners' finances and top tips, for example looking after their pension and the need for protection.

3 December – World Climate Summit

Runs from 3-4 December – alongside COP28 in Dubai.

8 December – Christmas Jumper Day

A chance to have a bit of fun while perhaps doing something positive for your community. Leans towards social content.

25 December – Christmas Day

Christmas Day can be an opportunity for some creative licence, whether that's using more humour or different formats than you would usually. Some content ideas include: a year in review wrap-up, a forecast ahead, a thank you to staff and/or clients, tips on a festive season that won't break the bank.

26 December – Boxing Day

31 December – End of Mortgage Guarantee Scheme

2024

January 2024

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January – A season for new beginnings, habits and resolutions (including financial ones). Peak season for holiday bookings

1 January – New Year's Day

Hook ideas can be based around resolutions, positive habits, having a financial re-set, planning ahead to minimise any surprises through the year, or even planning for those financial splurges.

You could also go deeper – thinking about the impact people want to have in the world and the steps they can take towards it. Supply budgeting tools, physical calendars or even weekly shopping lists to help people budget this year.

This could also be an opportunity to remind clients to use their valuable tax allowances before the end of the tax year. We've included some tips and suggestions on our website.

31 January – Self-assessment tax deadline

Help your clients with information on the deadline and how they can prepare. There's also content on our website you can use, like this info on the tax year beginning.

February 2024

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February – LGBTQ+ History Month

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Celebrate and educate your client base and colleagues on LGBTQ+ history.

Hook ideas can be around championing the gay rights movement and tips for providing relationship-related finance advice for same-sex couples.

10 February – Chinese New Year

11 February – Super Bowl (US NFL)

14 February – Valentine's Day

This is a chance to be playful and appreciative with internal and external audiences.

Also, a chance to try to address finance in relationships.

March 2024

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March – Beginning of spring, Spring Budget, Free Wills Month

3 March – Employee Appreciation Day

This can be both internal and external – demonstrate your thanks to staff and celebrate them with clients, or spotlight colleagues who have made a real difference.

7 March – World Book Day

A chance to be creative and generous, inside and out. Ideas could involve your team sharing their top books of the year, your advisers sharing the books that shaped their attitude towards money, sending clients a surprise book that may be about money, but may be more tangential or holistic.

8 March – International Women's Day

There will be lots of news pieces and new information on this day that you can then use as hooks. For example: the gender pay gap, gender pension gap, celebrating examples of women who are beating the odds and taking financial matters into their own hands, or investing tips for women. The content could be written, videos, or even events.

It's also a chance to check in with and celebrate the women in your team.

10 March – Mothering Sunday

As with Father's Day, an interesting content piece could give some insight into the role of mothers in shaping their family's financial lives, the pressures they face or ways that things have changed.

If you have the resource, a small research project could be interesting for both clients and colleagues.

10 March – National Freelancers Day

Engage freelancing clients with content about the financial challenges and opportunities they face, as well as top tips and common mistakes. This then sets you up to showcase how your firm can support them.

29 March – Good Friday

31 March – Easter Sunday

April 2024

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April: Financial Literacy Month

1 April – Easter Monday

5 April – Tax Year End

6 April – Start of New Tax Year

New tax thresholds are applied, which means higher earners could be better off paying earnings over £121K into their pension. Or they might want to consider paying themselves in dividends, or find another way to maximise their tax efficiencies. Look out for our support...

20 April – World Snooker Championship

Runs from 20 April – 6 May.

21 April – World Creativity and Innovation Day

22 April – Earth Day

Earth Day is an annual event on 22 April to show your support for environmental protection.

This could be a useful time to educate your clients about sustainable or ESG investing.

You can find comprehensive materials on sustainable investing on our website.

May 2024

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May

6 May – Early May Bank Holiday

The first May Bank Holiday is one of the biggest weekends of the year for DIY. So you could link this to home-related finances or starting new projects.

13 May – Mental Health Awareness Week

Runs from 13-20 May.

You may want to have internal employee check-ins about mental health and wellbeing. Both internally and externally, this is a good opportunity to create or share articles covering the link between financial and mental health. Or financial wellbeing content, such as a quiz or five steps to improve your financial and mental health.

27 May – Spring Bank Holiday

The perfect time to share content around spring cleaning your finances.

June 2024

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June – Beginning of summer, LGBTQ+ Pride Month

5 June – World Environment Day

Here, you can link to sustainable investing, or the positive environmental choices that are within our individual control. You can find comprehensive materials on sustainable investing on our website.

14 June – Men's UEFA Euro 2024 finals

Runs from 14 June - 14 July.

16 June – Father's Day

An interesting content piece could give some insight into the role of fathers in shaping their family's financial lives, the pressures they face or ways that things have changed.

If you have the resource, a small research project could be interesting for both clients and colleagues.

30 June – Sustainability Disclosure Requirements (SDR) policy

Help your clients understand the published FCA's proposals on the 2024 Sustainability Disclosure Requirements. This is an opportunity to talk to clients about the regulation changes and what this means for them.

July 2024

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July

1 July – Wimbledon Championships

Runs from 1-14 July.

5 July – F1 British Grand Prix

Runs from 5-7 July.

6 July – Net Zero Week

Runs from 6-12 July.

If your firm is taking a Net Zero approach or has made progress towards it, now is the time for you to shout about it internally and externally.

18 July – 152nd Open Golf Championship

The Open runs from 18-21 July.

31 July – New Consumer Duty rules come into force

Before the rules come into force, you can conduct an internal awareness campaign to educate colleagues (you may find our Consumer Duty hub useful here).

This can include what they need to know, what changes are being made, and what they need to do going forward.

For clients, you can reassure them that you're preparing for the changes. Explain in basic terms what the Consumer Duty is, what your firm has done about it, and what it means for them.

August 2024						
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August

14 August – July Inflation Announcement

The inflation figure for July is important, as it's used to set the increase in rail fares, which will take place from the start of 2024.

Once the figures have been released, you can send communications to clients letting them know what's happened and what it means for them.

26 August – Summer Bank Holiday

Looking for more tips?

If you'd like extra ways to boost your practice's profitability and support your clients, you can find more useful tools and resources at www.adviserservices.fidelity.co.uk

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