



Seminar Planning Calendar

2025

First things first.

Establish a *marketing plan.*

Ask yourself, how frequently do I want to hold events? Even if you don't actually book your events months in advance, you should at least have a strategy and tentative schedule in place.

Let your AcquireUp representative know your goals and they can help you lay out a long-term plan for the year.



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acquireup.com



January 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1 New Year's Day	2 Chanukah Ends	3	4 Educational Only
5	6	7	8	9	10	11 Educational Only
12	13	14	15	16	17	18 Educational Only
19	20 MLK Jr. Day	21	22	23	24	25 Educational Only
26	27	28	29	30	31	

February 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1 Educational Only
2	3	4	5	6	7	8 Educational Only
9	10	11	12	13	14 Valentine's Day	15 Educational Only
16	17 Presidents Day	18	19	20	21	22 Educational Only
23	24	25	26	27	28	

March 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
23	24	25	26	27	28	1 Educational Only
2	3	4	5	6	7	8 Educational Only
9 Daylight Saving Starts	10	11	12	13	14	15 Educational Only
16	17 St. Patrick's Day	18	19	20	21	22 Educational Only
23	24	25	26	27	28	29 Educational Only
30	31					

April 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1 April Fool's Day	2	3	4	5 Educational Only
6	7	8	9	10	11	12 Educational Only
13	14	15	16	17	18 Good Friday	19 Educational Only
20 Easter	21 Easter Monday	22 Earth Day	23	24	25	26 Educational Only
27	28	29	30			

May 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3 Educational Only
4	5 Cinco de Mayo	6	7	8	9	10 Educational Only
11 Mother's Day	12	13	14	15	16	17 Educational Only
18	19	20	21	22	23	24 Educational Only
25	26 Memorial Day	27	28	29	30	31 Educational Only

June 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7 Educational Only
8	9	10	11	12	13	14 Educational Only
15 Father's Day	16	17	18	19 Juneteenth	20	21 Educational Only
22	23	24	25	26	27	28 Educational Only
29	30					

July 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4 Educational Only
5	6	7	8	9	10	11 Independence Day
12	13	14	15	16	17	18 Educational Only
19	20	21	22	23	24	25 Educational Only
26	27	28	29	30		

August 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2 Educational Only
3	4	5	6	7	8	9 Educational Only
10	11	12	13	14	15	16 Educational Only
17	18	19	20	21	22	23 Educational Only
24	25	26	27	28	29	30 Educational Only
31						

September 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
8	9 Labor Day	10	11	12	13	14 Educational Only
15	16	17	18	19	20	21 Educational Only
22	23	24	25	26	27	28 Educational Only
29	30					

October 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	
1	2	3	4	5	6	7 Educational Only
8	9	10	11	12	13	14 Educational Only
15	16	17	18	19	20	21 Educational Only
22	23	24	25	26	27	28 Educational Only
29	30					

November 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1 Educational Only
2	3	4 Election Day	5	6	7	8 Educational Only
9	10	11 Veterans Day	12	13	14	15 Educational Only
16	17	18	19	20	21	22 Educational Only
23	24	25	26	27 Thanksgiving Day	28 Black Friday	29 Educational Only
30						

December 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6 Educational Only
7	8	9	10	11	12	13 Educational Only
14	15	16	17	18	19	20 Educational Only
21	22	23	24 Christmas Eve	25 Christmas Day	26	27 Educational Only
28	29	30	31 New Year's Eve			

December 2024



Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24 Christmas Eve	25 Christmas Day Chanukah Begins	26 Kwanzaa Begins	27	28
29	30	31 New Year's Eve	1	2	3	4

Ask about...Our campaigns for these topics:

- IRA Holder
 - Life Insurance
 - Wealth Management
 - College Planning
 - Affluent Women
 - Social Security
- Medicare
 - Millionaires
 - Safe Money
 - Christians
 - Estate Planning
 - ...to name a few

Notes

Excellent Dates

Caution Call Us

Midday Events Only

Not Recommended

January 2025



Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1 New Year's Day	2 Chanukah Ends	3	4 Educational Only
5	6	7	8	9	10	11 Educational Only
12	13	14	15	16	17	18 Educational Only
19	20 MLK Jr. Day	21	22	23	24	25 Educational Only
26	27	28	29	30	31	1

■ Excellent Dates
 ■ Caution Call Us
 ■ Midday Events Only
 ■ Not Recommended

Have your AcquireUp Marketing Consultant do a complimentary demographic analysis of your entire marketing area. Then identify marketing quadrants you can utilize throughout the year.

Get started now!
Be sure to get started at least 5 weeks before your first event date.

Notes

February 2025



Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1 Educational Only
2	3	4	5	6	7	8 Educational Only
9	10	11	12	13	14 Valentines Day	15 Educational Only
16	17 Presidents Day	18	19	20	21	22 Educational Only
23	24	25	26	27	28	1

Excellent Dates Caution Call Us Midday Events Only Not Recommended

Which days of the week work best?
Generally, Mondays, Tuesdays, Wednesdays, and Thursdays are the optimum days to hold your events. Friday lunches are viable options as well. Some marketers schedule two events in one week while others find that scheduling them across two weeks is more effective. The key to success is to give your prospect a few options.

Mailing Frequency - How often should prospects receive invitations? Keeping your content fresh produces superior results and helps avoid saturation. Ideally, prospects shouldn't receive the same offer within 60-90 days.

Notes

March 2025



Sun	Mon	Tue	Wed	Thu	Fri	Sat
23	24	25	26	27	28	1 Educational Only
2	3	4	5	6	7	8 Educational Only
9 Daylight Saving Starts	10	11	12	13	14	15 Educational Only
16	17 St. Patrick's Day	18	19	20	21	22 Educational Only
23	24	25	26	27	28	29 Educational Only
30	31	1	2	3	4	5

Don't ignore market demographics when deciding on event times.

Evening and dinner-time events typically draw more attendees than lunch events (depending on your targeted demographic), because many of your prospects may still work and be unable to break away from their job during the day to attend a lunch. Be sure to have at least one dinner event if you reach out to prospects under 62. We typically recommend two dinners and one lunch.

Notes

April 2025



Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1 April Fool's Day	2	3	4	5 Educational Only
6	7	8	9	10	11	12 Educational Only
13	14	15	16	17	18 Good Friday	19 Educational Only
20 Easter	21 Easter Monday	22 Earth Day	23	24	25	26 Educational Only
27	28	29	30	1	2	3

Remember your best prospects will respond to a formal “wedding style” invitation. Be sure to focus on your message and bio to drive a better response from motivated prospects.

Notes

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May 2025



Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3 Educational Only
4	5 Cinco de Mayo	6	7	8	9	10 Educational Only
11 Mother's Day	12	13	14	15	16	17 Educational Only
18	19	20	21	22	23	24 Educational Only
25	26 Memorial Day	27	28	29	30	31 Educational Only

Plan Ahead.
Many financial professionals say they truly started maximizing their opportunities when they developed a marketing plan for the year.

Be specialized and focus on your strengths.
No matter how you distinguish yourself and your practice from others, your prospects must know you have the experience and expertise to understand their situation and provide the right advice for their financial situation.

Notes

Excellent Dates Caution Call Us Midday Events Only Not Recommended

June 2025



Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7 Educational Only
8	9	10	11	12	13	14 Educational Only
15 Father's Day	16	17	18	19 Juneteenth	20	21 Educational Only
22	23	24	25	26	27	28 Educational Only
29	30	1	2	3	4	5

Use highly-targeted mailing lists.
Top producers often utilize asset levels, Household Income list or some combination thereof to refine their target audience. Ask about identifying fresh un-mailed prospects that have never seen your message or your competition.

Notes

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July 2025



Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4 Independence Day	5 Educational Only
6	7	8	9	10	11	12 Educational Only
13	14	15	16	17	18	19 Educational Only
20	21	22	23	24	25	26 Educational Only
27	28	29	30	31	1	2

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Top producers market in the summer months. Why? Because they know it only takes one new client to pay for the entire campaign. In addition, there are 13 weeks to the summer, which means most prospects are at home, not on vacation.

Test various campaign elements to maximize your results. Test variables independently to pinpoint exactly what change produced the best results. In some cases, "better" may actually mean less total responses but more clients. In short, focus on your ROI not your response rate to determine the true success of your marketing.

Notes

August 2025



Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2 Educational Only
3	4	5	6	7	8	9 Educational Only
10	11	12	13	14	15	16 Educational Only
17	18	19	20	21	22	23 Educational Only
24	25	26	27	28	29	30 Educational Only
31	1	2	3	4	5	6

Measure results and make adjustments.
Let your mailing list do the work of qualifying prospects. Do not pick random zip codes because you think they are better or more affluent than others. Target prospects in a radius around the venue that match your demographic criteria.

Notes

September 2025



Excellent Dates Caution Call Us Midday Events Only Not Recommended

Seminar Marketing works.
It's been proven, seminar marketing is the single best way to get in front of a large group of prospects, and the fastest way to fill your pipeline with new potential clients.

There are a number of factors that determine the success (or failure) of a seminar marketing program. One of the most overlooked components of a sound seminar mailing: developing a longterm mailing strategy that fits your market. This is where a seasoned AcquireUp Consultant can help you maximize your short and long-term success.

Notes

October 2025



Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4 Educational Only
5	6	7	8	9	10	11 Educational Only
12	13 Columbus Day	14	15	16	17	18 Educational Only
19	20	21	22	23	24	25 Educational Only
26	27	28	29	30	31 Halloween	1

Get a true understanding of your prospects and market segments.
Research and learn as much as you can about prospects in your target market, or at least seek assistance from a trusted marketing firm to help guide you.

Build your brand.
Understand what your clients and prospects want, add it to your list of service offerings, and build your brand around it. It enhances your relationship with your clients and attracts more people like them.

Notes

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9	10	11 Veterans Day	12	13	14	15 Educational Only
16	17	18	19	20	21	22 Educational Only
23	24	25	26	27 Thanksgiving Day	28 Black Friday	29 Educational Only
30	1	2	3	4	5	6

Don't compete with the holidays.
Try to avoid scheduling events directly before or after a major holiday. It's recommended to hold November and December seminars as early as possible in the month to allow time to complete the appointment closing process.

Notes

December 2025



Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6 Educational Only
7	8	9	10	11	12	13 Educational Only
14	15	16	17	18	19	20 Educational Only
21	22	23	24 Christmas Eve	25 Christmas Day	26	27 Educational Only
28	29	30	31 New Year's Eve	1	2	3

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Scan Now
To Get Started

Phone
800-771-9898

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Notes

Ask About...
Our "omni-channel" marketing programs.

January 2026



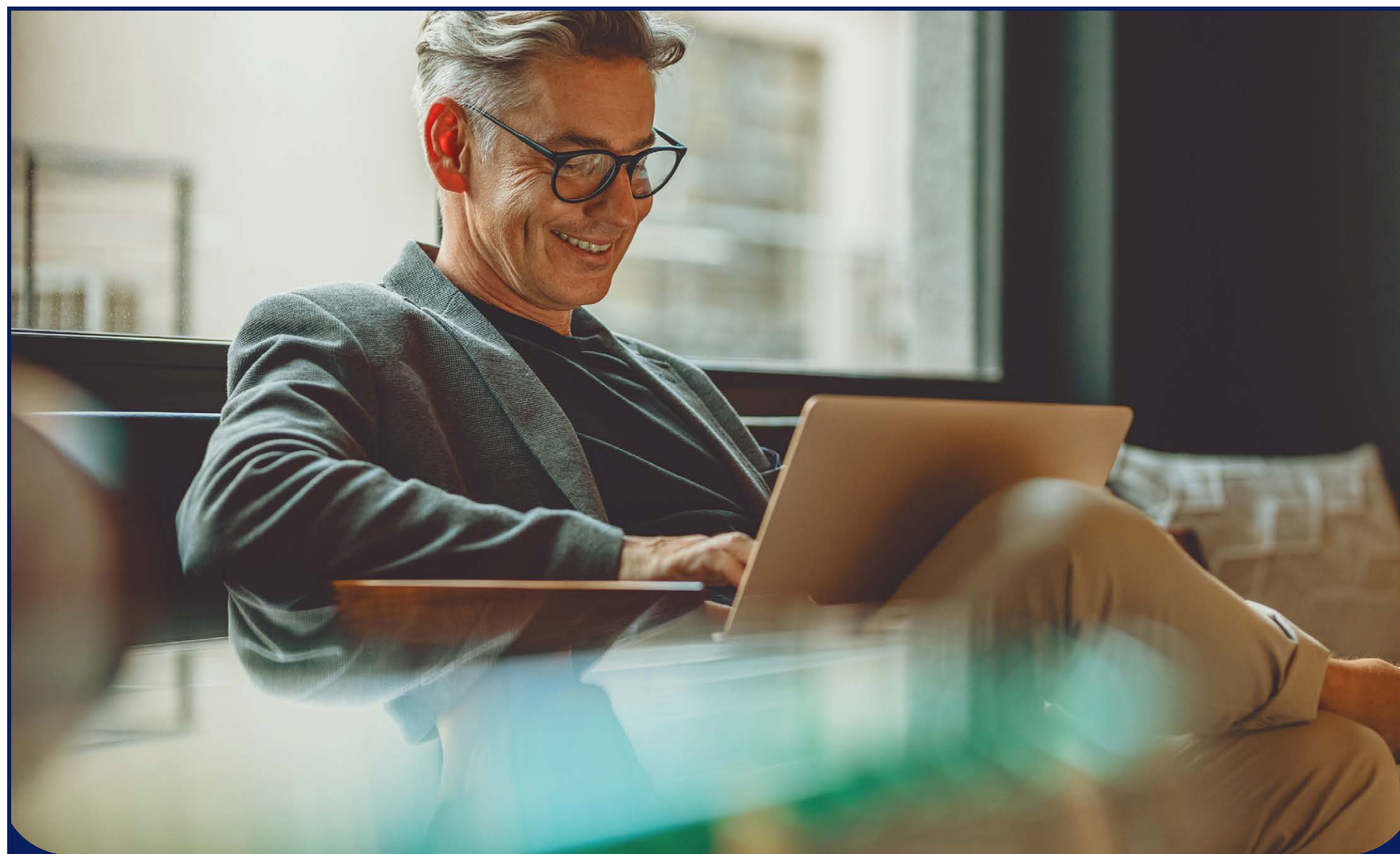
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Use a marketing firm specializing in the financial industry.

Motivating a quality prospect to respond can be a challenge. Doing it yourself is like one of your prospects putting together a financial plan. It does not work in the long run. You may succeed once or not at all. We know what works, but more importantly what doesn't. And this knowledge will maximize your likelihood of success.

Notes



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