

Seminar Planning Calendar



2026

First things first.

Establish your *seminar marketing plan.*

Before selecting dates or booking venues, take the time to define your strategy.

Ask yourself:

- How often should I host events to meet my growth goals?
- Which seminar formats work best for my market?
- How can I maintain consistent lead flow without oversaturating my audience?

Even if you're not ready to lock in dates months in advance, having a tentative plan creates clarity and momentum.

Partner with your CreativeOne Client Success Manager to map out a long-term seminar strategy that aligns with your goals and budget. Whether you're running monthly seminars to drive steady lead flow, quarterly events for balanced scheduling, or seasonally timed campaigns around key decision periods, your CSM will help you build a plan designed for consistency and performance.

Pro tip: Advisors who plan their seminar calendar early tend to see better registrations, stronger attendance, and more predictable results throughout the year.



	Excellent Dates		Late-Mornings & Lunch Events Only
	Caution Call Us		Not Recommended

2026 Planning Calendar

January

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

February

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	25	26	27	28

March

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	25	26	27	28
29	30	31	1	2	3	4

April

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

May

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

June

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

July

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

August

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

September

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

October

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

November

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	25	26	27	28
29	30	1	2	3	4	5

December

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

January 2026

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

A STRONG START SETS THE TONE FOR THE YEAR.

As a new year begins, many prospects are actively reassessing their financial priorities and looking for direction. January consistently presents a valuable opportunity to engage motivated attendees who are open to education and planning conversations.





Hosting seminars this month allows you to establish credibility early and guide prospects through key considerations such as:

- Reviewing retirement timelines and long-term goals
- Building reliable income strategies for retirement
- Evaluating tax and Social Security considerations sooner rather than later

STRATEGIC PLANNING TIP:

Use the CreativeOne Seminar Best Practices guide as a reference when planning your events. It offers helpful direction on venue selection, optimal timing, recommended topics, and proven marketing strategies.

Notes

 Excellent Dates	 Late-Mornings & Lunch Events Only
 Caution Call Us	 Not Recommended

March 2026

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

TAX SEASON KEEPS FINANCES FRONT AND CENTER.

As tax preparation ramps up, financial decisions rise to the top of prospects' priority lists. March is a timely opportunity to engage audiences already thinking about income, taxes, and long-term planning.

STRATEGIC PLANNING TIP:

Align your seminar topics with current events and relevant financial conversations to improve engagement and registration quality.

BONUS TIP:

Be mindful of sporting events, such as March Madness, that may compete for attention. Avoid scheduling events during high-profile games to protect registration and attendance.

Notes



Excellent Dates



Late-Mornings & Lunch Events Only



Caution Call Us



Not Recommended

April 2026

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

EDUCATION BUILDS TRUST AFTER TAX SEASON.

Following tax deadlines, many prospects are open to learning how better planning could simplify future decisions. April is an ideal time to reinforce your role as an educational resource without competing with immediate deadlines.

STRATEGIC PLANNING TIP:

Avoid relying solely on digital marketing or direct mail. Use each marketing method to your advantage by rotating between mailers and digital ads to keep your audience and message fresh over the course of the year.

Notes



Excellent Dates



Late-Mornings & Lunch Events Only



Caution Call Us



Not Recommended

May 2026

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

MOMENTUM COMPOUNDS OVER TIME.

May is an excellent month to maintain visibility and reinforce your offerings before summer schedules shift. Advisors who stay active year-round often see stronger recognition and better long-term results.

STRATEGIC PLANNING TIP:

Consider incorporating client appreciation events as the weather improves. Show your clients you care by inviting them to an exciting function and encouraging them to bring a friend.

Notes



Excellent Dates



Late-Mornings & Lunch Events Only



Caution Call Us



Not Recommended

June 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1 ✓	2 ✓	3 ✓	4 ✓	5 !	6 !
7 ✗	8 ✓	9 ✓	10 ✓	11 ✓	12 !	13 !
14 Flag Day ✗	15 ✓	16 ✓	17 ✓	18 ✓	19 Juneteenth ☎	20 !
21 Father's Day ✗	22 ✓	23 ✓	24 ✓	25 ✓	26 !	27 !
28 ✗	29 ✓	30 ✓	1	2	3	4





SUMMER ACTIVITY HEATS UP.

As the year reaches its midpoint, many advisors pause their event marketing as they believe prospects are on vacation and not interested in attending a seminar. This can work to your advantage by capitalizing on the reduced competition!

STRATEGIC PLANNING TIP:

Reflect on the first half of the year. Which events drove the highest ROI? What about the lowest? Contact your CreativeOne CSM to evaluate your results and plan for the rest of the year.

Notes

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-  Late-Mornings & Lunch Events Only
-  Caution Call Us
-  Not Recommended

July 2026

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

VISIBILITY MATTERS — EVEN IN SUMMER.

While summer schedules vary, many prospects remain local and accessible. Maintaining a digital presence ensures your message stays visible even when in-person attendance fluctuates.

STRATEGIC PLANNING TIP:

Short-form video ads can be especially effective during casual browsing periods. Consider recording a quick 15- to 30-second video to use for your digital advertising creative. These ads help personalize your message and establish recognition with your local audience.

Notes

- ✓ Excellent Dates
- ☎ Caution Call Us
- ! Late-Mornings & Lunch Events Only
- ⊘ Not Recommended

August 2026

Sun Mon Tue Wed Thu Fri Sat

26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

SUMMER PREPARATION SETS UP FALL SUCCESS.

August is a valuable month to refine strategy and build anticipation for fall events. Staying visible now helps prevent gaps in awareness as routines return.



STRATEGIC PLANNING TIP:

Consistency matters. Stay active and committed to your marketing plan and fine-tune your processes to improve ROI and create predictable results in the months ahead.

Notes



Excellent Dates



Late-Mornings & Lunch Events Only



Caution Call Us



Not Recommended

September 2026

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

FOCUS RETURNS AS ROUTINES SETTLE IN.

With summer winding down, prospects are more predictable and engaged. September is one of the most dependable months for maintaining consistent seminar activity.

STRATEGIC PLANNING TIP:

Hybrid campaigns — combining digital advertising with direct mail — can increase reach and reinforce messaging during competitive seasons.

BONUS TIP:

September marks the start of NFL and college football! Pay close attention to your local team's schedule and avoid hosting during upcoming games.

Notes



Excellent Dates



Late-Mornings & Lunch Events Only



Caution Call Us



Not Recommended

December 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1 ✓	2 ✓	3 ✓	4 Chanukah Begins !	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 ✗	26 ✗
27 ✗	28 ☎	29 ☎	30 ✗	31 New Year's Eve ✗	1	2

YEAR-END TIMING ENCOURAGES ACTION.

Deadlines and reflection make December a powerful month for engaging prospects who want to make informed decisions before the year ends.

STRATEGIC PLANNING TIP:

Year-end campaigns perform best when expectations are clear and timelines are tight. Focus your messaging on clarity, preparation, and informed decision-making before deadlines arrive.

Notes

Contact your Client Success Manager for more information.

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January 2027

Sun Mon Tue Wed Thu Fri Sat

27	28	29	30	31	1 New Year's Day	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18 MLK Jr. Day	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

CARRY YOUR MOMENTUM INTO THE NEW YEAR.

As you close the books on 2026 and look ahead to 2027, this is the ideal time to evaluate what worked — and what didn't — before locking in your plan for the year ahead. A thoughtful review now helps eliminate guesswork and sets the foundation for stronger results in the year ahead.

STRATEGIC PLANNING TIP:

Partner with CreativeOne to build a data-driven seminar strategy for 2027. With decades of experience and thousands of campaigns executed nationwide, your CreativeOne team can help you analyze past results, identify opportunities for improvement, and create a plan designed for consistent growth, so you're not starting from scratch or going at it alone.

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Contact your Client Success Manager for more information.