2027 BANK MARKETING CALENDAR

One campaign. Four coordinated touchpoints. One memorable promotional product.

JANUARY - JUNE

MONTH	CAMPAIGN THEME	FEATURED PRODUCT	EMAIL CAMPAIGN	SOCIAL MEDIA	EVENT / OUTREACH	CLIENT GIFT
JAN	**Start the year money-smart**	**Budget-planning notepad**	Share a simple spending-plan worksheet and savings goal prompts.	Post three practical tips for setting realistic money goals.	New-year budgeting workshop / branch open house	Offer branded budget pads with a free planning worksheet.
FEB	**Safer banking habits**	**Microfiber screen cloth**	Send tips to recognize impersonation and phishing scams.	Share a short scam-spotting checklist; link to official resources.	Fraud prevention talk / senior center outreach	Pair screen cloths with fraud-awareness cards.
MAR	**Support local businesses**	**Pocket business notebook**	Share a small-business cash-flow planning checklist.	Spotlight local merchants with their permission.	Chamber mixer / business networking expo	Offer pocket notebooks to local business owners.
APR	**Financial Literacy Month**	**QR-code resource bookmark**	Email a free financial literacy resource guide for all ages.	Post a weekly budgeting or savings educational tip.	Money-skills workshop / school partnership	Give bookmarks linking to approved learning resources.
MAY	**Planning for life milestones**	**Goal-setting journal**	Share planning tips for graduation, moving and major goals.	Post a carousel of financial questions to ask before changes.	Graduate resource fair / community education event	Provide journals for planning important next steps.
JUN	**Make banking more convenient**	**Foldable phone stand**	Explain safe ways to use online and mobile banking tools.	Share accessible digital banking tips with security reminders.	Digital banking demo / community workshop	Offer phone stands with a digital safety tip card.

A SIMPLE MONTHLY ROLLOUT

Week 1: helpful email | Week 2: social post | Week 3: local event | Week 4: useful gift

WE PUT YOUR BRAND TO WORK

Bank compliance review: advertising, privacy, fair lending and disclosures.

Approve outreach and gifts; never imply account-opening rewards.

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JULY - DECEMBER

MONTH	CAMPAIGN THEME	FEATURED PRODUCT	EMAIL CAMPAIGN	SOCIAL MEDIA	EVENT / OUTREACH	CLIENT GIFT
JUL	**Community connection**	**Reusable water bottle**	Invite customers to local summer events and volunteer days.	Highlight community partnerships and volunteers.	Summer festival / community service day	Give refillable bottles at approved outreach events.
AUG	**Back-to-school money skills**	**Branded pencil pouch**	Send age-appropriate ways to talk with students about money.	Share a student savings and spending checklist.	School supply drive / youth money workshop	Distribute pencil pouches at education events.
SEP	**Build an emergency fund**	**Savings tracker magnet**	Share a step-by-step guide to planning for unexpected costs.	Post an easy savings habit challenge without return promises.	Preparedness fair / community resource day	Include tracker magnets in financial education packs.
OCT	**Cybersecurity awareness**	**Webcam privacy cover**	Email a practical guide to safer passwords and MFA.	Post a series on spotting suspicious texts and fake links.	Cyber safety seminar / community technology fair	Pair privacy covers with approved online safety tips.
NOV	**Thank customers and merchants**	**Insulated coffee tumbler**	Send a gratitude message and local small-business spotlight.	Celebrate customer stories with prior permission.	Local merchant appreciation / holiday food drive	Offer tumblers as approved, modest appreciation gifts.
DEC	**Plan ahead for 2028**	**2028 desk calendar**	Share an annual financial checkup and goal-setting checklist.	Post year-end community highlights and budgeting reminders.	Year-end education open house / charity event	Provide planning calendars with useful reminder dates.

MAKE IT AFFORDABLE AND REPEATABLE

Choose 1-2 promotional products per quarter, not 12. Repeat each campaign across your channels.

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