2027 MORTGAGE LENDER 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	**Set homebuying goals**	**Branded goal-setting notepad**	Share a 2027 homebuying readiness checklist: goals, savings and documents.	Post 3 steps to prepare early; show the planning notepad.	First-time buyer webinar / library workshop	Offer notepads with a homebuyer checklist.
FEB	**Budget & credit basics**	**Pocket budget planner**	Explain how lenders assess income, debt and credit; invite questions.	Myth vs. fact: credit and mortgage preapproval.	Community financial-literacy session	Give planners to educational attendees.
MAR	**Spring purchase prep**	**Tabbed document folder**	Send a mortgage document checklist and a preapproval explainer.	Short reel: prequalification vs. preapproval; show folder.	Spring homebuyer seminar / housing expo	Provide folders with a preparation checklist.
APR	**Know closing costs**	**Branded pocket calculator**	Walk through common closing-cost categories; explain estimates vary.	Carousel: terms found on a Loan Estimate.	Public mortgage-cost Q&A; session	Offer calculators at educational events.
MAY	**From offer to keys**	**Tape-measure keychain**	Share a plain-English timeline from accepted offer to closing.	Checklist: inspections, appraisal and final walkthrough.	Neighborhood homebuyer information fair	Hand out keychains with moving tips.
JUN	**Homeownership month**	**Home-care checklist magnet**	Explain budgeting beyond the payment: taxes, insurance and upkeep.	National Homeownership Month: 4 upkeep habits.	Public homeowner education workshop	Give maintenance magnets with useful reminders.

A SIMPLE MONTHLY ROLLOUT

Week 1: education email | Week 2: social tips | Week 3: public workshop | Week 4: useful client takeaway

WE PUT YOUR BRAND TO WORK

Compliance review: RESPA Section 8 prohibits gifts tied to settlement-service referrals; follow lending-ad rules. Event suggestions are not confirmed listings. Obtain email permissions and use required advertising disclosures.

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JULY - DECEMBER

MONTH	CAMPAIGN THEME	FEATURED PRODUCT	EMAIL CAMPAIGN	SOCIAL MEDIA	EVENT / OUTREACH	CLIENT GIFT
JUL	**Summer moving season**	**Reusable moving-day tote**	Send a moving budget and post-closing to-do list.	Video: 5 things to handle before move-in day.	Summer community / housing resource event	Share totes at public education booths.
AUG	**Compare loan features**	**Mortgage comparison note pad**	Explain questions to ask about rates, terms, APR and payment changes.	Fixed vs. adjustable: factors to discuss with a lender.	Online mortgage-education Q&A;	Distribute worksheet pads to attendees.
SEP	**Protect vital records**	**Water-resistant document pouch**	Share a checklist for storing key housing documents securely.	Show a sample emergency home-documents kit.	Community preparedness fair / workshop	Give pouches with a records checklist.
OCT	**Home finance checkup**	**Magnetic home-expense tracker**	Offer a yearly checkup checklist for escrow, taxes and insurance.	Explain what an escrow account may cover.	Homeowner education / budget clinic	Provide trackers as general educational takeaways.
NOV	**Thank homeowners**	**Branded greeting note cards**	Send an appreciation note plus seasonal home-care reminders.	Share a gratitude message and helpful homeowner tips.	Community volunteer / housing resource outreach	Mail a handwritten thank-you, never for referrals.
DEC	**Plan for 2028**	**2028 mini desk calendar**	Share a year-end mortgage and housing goals checklist.	Post 3 simple steps for next-year buyers.	Year-end financial planning webinar	Send calendars with a personal seasonal note.

MAKE IT AFFORDABLE AND REPEATABLE

Choose 1-2 promotional products per quarter, not 12. Reuse the theme across your channels and order early.

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