



FINANCIAL SERVICES

Virtual And Live Event Marketing Guide & Calendar

If you're ready to grow your financial business, LeadingResponse is prepared to help get you there. Now is the time to plan for 2024 and find solutions that turn motivated and high-income prospects into quality clients for your business.

Q1



Better Results. Better Technology. Better Service.

The key to incredible growth is partnering with the industry leader in financial services marketing. And no one has more experience or expertise than LeadingResponse.

JANUARY

Dates: New Year's Day 1/1, Dr. Martin Luther King, Jr., Day 1/15

Financial seminars are proven to be successful. Face-to-face interactions. Building relationships. In-person educational events have proven successful for decades. Get in front of the right audience, at the right time, with the right message.

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No Events Good Event Dates Caution Call Us
When reviewing dates, be aware of major sporting events



SCAN ME

FEBRUARY

Dates: Valentine's Day 2/14, Presidents Day 2/19, Ash Wednesday 2/14

People today want to choose how, where, and when to connect. At their desk. At home. On the move. Reach them with webinars. Our webinar solution, WebinarConnect, makes it easy. Just pick a date and a time, and we'll handle the rest. Customizable landing pages, branded content, and our multichannel targeting put the right prospects in front of you, at the right time, in the right place.

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MARCH

Dates: St. Patrick's Day 3/17, Good Friday 3/29, Easter 3/31

Get the data you need to grow your business at your fingertips. Plan and monitor campaigns, dig deep into performance analytics in real-time, and get access to more data in less time with our newly enhanced client portal, Hub. Featuring simplified navigation, ease of use, and a personalized and secure experience, you can start analyzing your results and growing your business.

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SCAN ME

Q2



Creating Connections, Forged by Data and Insight.

Our multichannel solutions have generated over \$117 billion in revenue for our clients, and we have the highest response rate in the industry.

APRIL

Dates: Passover 4/22-4/30, Tax Day 4/15

Meet prospects face-to-face. One-on-one in-person or online appointments can solidify your business as the right fit for their needs. Targeted ads with incentives put the right prospects directly on your calendar. Seamlessly. All you need to do is choose the appointment dates and times – we do the rest.

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SCAN ME

MAY

Dates: Mother's Day 5/12, Memorial Day 5/27

Become a trusted instructor and guide future clients through the building blocks of retirement or complex financial decisions. With two unique Educational Workshop options, these easy-to-use, turnkey solutions will help you build trust while you take your business to the next level.

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JUNE

Dates: Father's Day 6/16, Juneteenth 6/19

Save time, money, and energy. We reach more qualified prospects and save our clients money through our partnerships with Meta, Google, Horsesho, Fleming's Prime Steakhouse & Wine Bar, and Ruth's Chris Steak House.

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SCAN ME



Driven by Data. Guided by Experts.

Our exclusive Consumer Database Platform allows us to target your ideal prospects and help you turn them into revenue-generating clients.

JULY

Dates: Independence Day 7/4

Reach prospective clients anytime, anywhere. Take advantage of our Hybrid Solution – combining financial seminars with webinars. This solution combination results in higher attendance rates as prospects can engage in the manner they prefer - whether at a local restaurant or in the comfort of their homes.

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AUGUST

We bring consumers and financial professionals together. You need a marketing partner that understands your business inside and out. With close to 30 years of industry experience, you can trust LeadingResponse to help you grow your financial business.

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SEPTEMBER

Dates: Labor Day 9/2

Experience real growth through personalized solutions. LeadingResponse understands the consumer journey and can craft marketing solutions specific to your market that will grow your business. Our data-based decisions elevate your brand and locate your ideal client across the United States.

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SCAN ME

Q4



Now is the Time to Activate Growth for Your Financial Business.

We offer more customer acquisition solutions – from financial seminars, webinars, one-on-one appointments, educational workshops, and more – to help you grow your financial business fast.

OCTOBER

Dates: Rosh Hashanah 10/2-10/4, Columbus Day & Indigenous People's Day 10/14, Yom Kippur 10/11-10/12, Halloween 10/31

Connect with more qualified prospects. We leverage technology and expertise to target highly qualified prospects for our clients. Our extensive Consumer Data Platform and Consumer Activation Engine enable us to consistently deliver results, activate growth, and impact positive change. We connect consumers to experts at exactly the right time help is needed.

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SCAN ME

NOVEMBER

Dates: All Saints Day 11/1, Veterans Day 11/11, Thanksgiving Day 11/28

Enjoy faster results & lower acquisition costs. We've cracked the code to generating high-quality, motivated prospects – consistently. Our marketing solutions are custom designed to put you in front of your ideal audience.

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DECEMBER

Dates: Hanukkah 12/25-1/2/25, Christmas Day 12/25, Kwanzaa 12/26-1/1, New Year's Eve 12/31

2025 is a new year, with new opportunities. Plan your marketing strategy now to realize new levels of success in the coming year. Reach a broader audience with LeadingResponse at your side.

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Financial Seminars and Virtual Events Calendar At-A-Glance

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FEBRUARY

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MARCH

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APRIL

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JUNE

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JULY

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AUGUST

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SEPTEMBER

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OCTOBER

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DECEMBER

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2024 New Client Acquisition Goal Worksheet

Now is the time to focus on moving forward, engaging with new prospects, and growing your business. Our marketing solutions are proven successful. Let us help position you for long-term success.

Find out what success means for your business. Use this worksheet to calculate how many new clients your campaigns must generate to meet your 2024 production goals. When you're done, get in touch with your marketing consultant to discuss rollout of your plan and steps to make it happen.

2024 Sales Goals (Line 1)		Average Sale (line 2)		Total Clients (Line 1 + Line 2)	
Product	Amount				
Life and Annuity Premium	\$ _____	÷	\$ _____	=	\$ _____
Investment Products AUM: (Traditional & Alternative)	\$ _____	÷	\$ _____	=	\$ _____
TOTAL:	\$ _____			TOTAL CLIENTS NEEDED:	\$ _____



Ready to start scheduling your events now?
Sign up for your free consultation, and let's get started.

Call us at (888) 907-3971 or visit us at LeadingResponse.com/Financial

