

Financial Services Marketing Seasonal Spend Calendar

Plan your marketing content for the year with our insights-driven calendar and be a trusted advisor on financial well-being and literacy.



Now more than ever, financial well-being is a priority for consumers.

As attitudes change, financial services firms can serve consumers as active, year-round advisors.

The number of people seeking financial information is growing. For example, in the second week of March 2020, Google **searches for “how to invest” increased 61%** compared to the same week in March the previous year.¹ The demand for solid financial advice is not going away anytime soon. That’s why we developed a monthly Financial Services Marketing Seasonal Spend Calendar that highlights relevant consumer finance trends happening throughout the year.

Using data from LinkedIn, Google search trends, and relevant research points from Forrester, our calendar provides insight-driven content suggestions so you can strategically engage consumers **at the right moments in time**.

With content marketing, where you publish is as important as what you publish. LinkedIn members are **2x more likely to want to learn or seek advice**, making our platform the perfect showcase for brands to promote content that helps consumers with their financial well-being.²

1: ThinkwithGoogle How Consumers Navigate Financial Wellness in a Time of Uncertainty, 2020

2: Custom Nielsen Lab Study commissioned by LinkedIn, August 2017



Content Calendar

This is an interactive calendar that gives you a complete overview of content ideas throughout the year while allowing you to jump directly to the info you need most. Use this page as your jumping off point.

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2

January	February	March	April
<div>\$ New Year Job Trends</div> <div>\$ Student Loans</div> <div>\$ Divorce Financial Advice</div> <div>\$ Paying Dividends</div>	<div>☕ Spring Pregnancies</div> <div>☕ Home Improvement Tips</div> <div>\$ Happy Retirement</div>	<div>\$ Last Minute Tax Checklist</div> <div>📅 Women in Finance</div> <div>\$ Winter Federal Rate Update</div>	<div>\$ Congrats Grads!</div> <div>📅 Celebrate Small Business Lenders</div> <div>\$ Spring Federal Rate Update</div>
May	June	July	August
<div>☕ Pride Month</div> <div>\$ Job Hunting Advice</div> <div>\$ Time Well Spent</div>	<div>\$ Purchasing a Home</div> <div>\$ Credit Card Benefits</div> <div>☕ Summer Pregnancies</div>	<div>\$ Paying for College</div> <div>\$ Aligning Finances with Your Career</div>	<div>\$ Divorce Financial Advice</div> <div>📅 Summer Federal Rate Update</div>
September	October	November	December
<div>📅 Election Fever</div> <div>📅 Cyber Security Awareness</div>	<div>📅 Black Friday</div>	<div>\$ Fall Federal Rate Update</div> <div>📅 'Tis the Season</div> <div>\$ Contributing to Your IRA</div>	<div>\$ New Year's Savings</div> <div>\$ Bonus Season</div> <div>\$ Dos and Don'ts of 401k Rollover</div> <div>\$ Preparing for Tax Season</div>

Click to jump to:

1

A specific month

2

A piece of content

3

Back to the calendar

Content Categories

\$ Financial Literacy

The spending, earning, saving, and discussing of money, capital and income.

☕ Lifestyle

People's interests, opinions, behaviors, and anything else that pertains to their lifestyle.

📅 Holiday/Event

Content inspired by holidays and events.

3

📅

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New Year Job Trends



Take a top-level view of how the sectors have shifted throughout the year using a mini chart or infographic on actions most commonly taken when being promoted or changing jobs.

Trigger:

The Annual US Unemployment Report is published.

Key Insight:



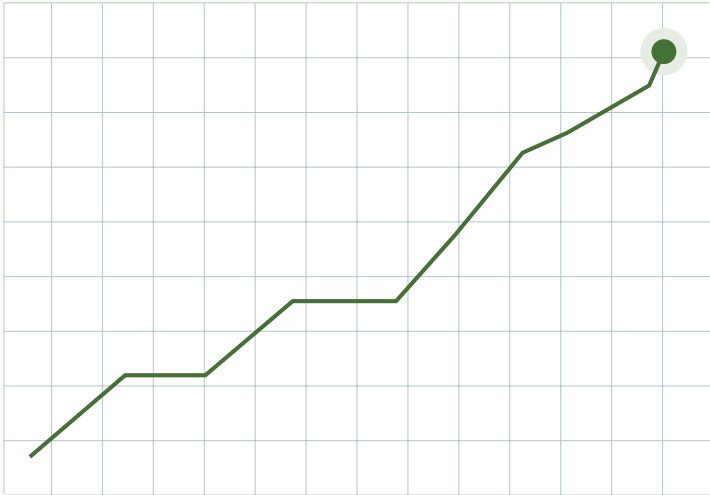
Consumers who recently changed jobs are **61% more likely** to still not have insurance.

Post:

Jan

In-market:

Jan-Feb



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Student Loans



Provide financial advice for students when they are most likely to be researching loans, interest rates, payment terms, and fees. Activate content that includes information on how your company supports students.

Trigger:

Searches for “Student loan” peak in the beginning of the year.

Key Insight:



of 16-17 years old American youth are concerned they will need loans or financial aid for college.

Post:

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In-market:

Jan–Feb



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Divorce Financial Advice

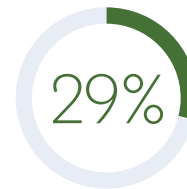


As divorce-related searches peak, consider content based around positive, real-life stories about change. Create ads around live events and benefits-based ads that positively empower consumers to take the stress out of finance.

Trigger:

“Divorce lawyer” searches peak for spring.

Key Insight:



of LinkedIn users who got divorced or separated in the past 12 months are looking to switch their financial providers.

Post:

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In-market:

Jan–Feb



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Paying Dividends

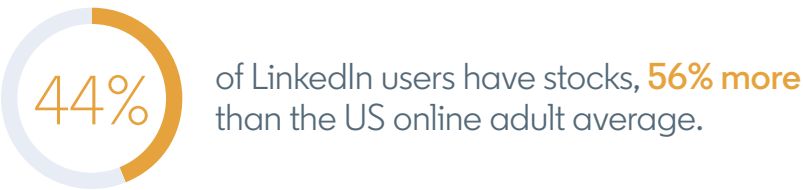


At the start of the new year, “dividend” searches peak, so consider promoting product awareness ads around investment accounts.

Trigger:

Searches for “dividend” peak.

Key Insight:



Post:

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In-market:

Jan–Feb



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Spring Pregnancies



As pregnancy-related searches peak, generate lifestyle content around preparing for parenthood. Share new parents' financial advice and create dynamic multimedia ads linking to content.

Trigger:

Searches for “pregnancy test” peak for spring.

Key Insight:



New parents aged 20-29 are **25% more anxious** about their financial situation than the general population.

Post:

Feb

In-market:

Feb–Mar



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Home Improvement Tips



Consumers are interested in home improvement during this time, so consider content that contains financial tips on how to make your home improvements happen such as remortgaging ads or loan ads with compelling home improvement imagery.

Trigger:

Searches for “home improvements” peak.

Key Insight:



of consumers visit a bank or credit union website to research mortgages and loans.

Post:

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In-market:

Feb–Mar



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Happy Retirement

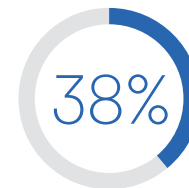


Searches for retirement gifts peak around this time, which means that retirement announcements are on the rise and retirees need to start making work-based financial transition decisions. Activate advice pieces on investment accounts or changing retirement accounts as part of a retirement financial checklist series. Consider framing these as mini lifestyle guides to ensure financial stability for the future.

Trigger:

Searches for “retirement gifts” peak.

Key Insight:



of consumers apply for an investment account online.

Post:

Mar

In-market:

Apr–Jun



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Last Minute Taxes Checklist



Build a “last minute” checklist of what businesses and self-employed consumers must do to meet the mid-April tax deadline.

Trigger:

Tax season is approaching.

Key Insight:



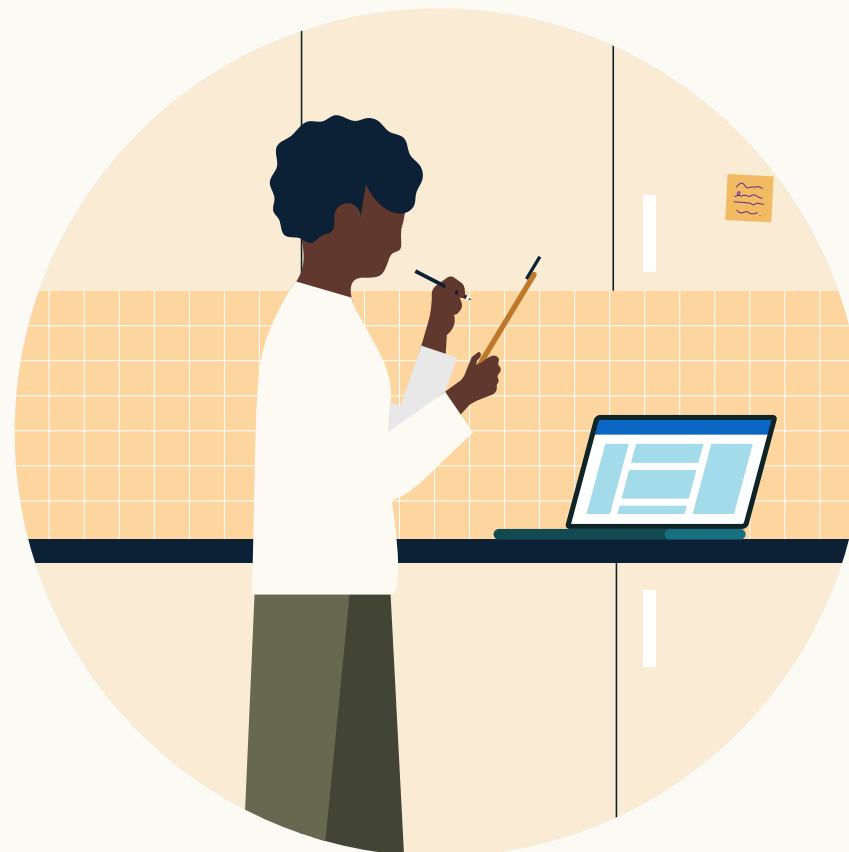
of LinkedIn users have used an accountant, attorney or an agent to prepare their taxes for them last year (**13% more likely** than the total US population).

Post:

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In-market:

Apr–Jun



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Women in Finance

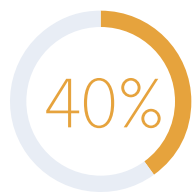


To celebrate International Women’s Day, consider a “Women in Finance” series championing board and employee diversity. Include inspirational and supportive case studies of challenging women-related financial issues along with stories of successful women.

Trigger:

International Women’s Day is March 8th.

Key Insight:



of women **do their own research** when making investment decisions and are more likely to prefer having all their financial products through **a single firm**.

Post:

Mar

In-market:

Apr–Jun



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Winter Federal Rate Update



Company insights around what a cut or rise to the Fed rate means for the economy can be deeply impactful for the consumer. Consider activating content that provides market insights and clear product positioning.

Trigger:

Searches for “fed rate” peak for winter.

Key Insight:



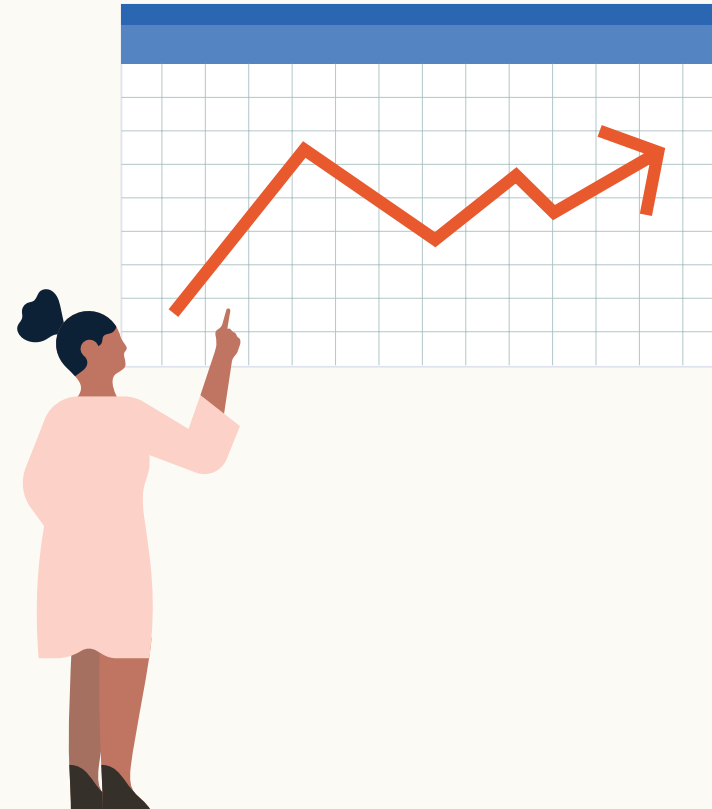
of consumers say interest rates were important in their decision to open or apply for a mortgage.

Post:

Mar

In-market:

Apr–Jun



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Congrats Grads!

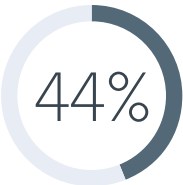


As graduation-related searches peak, develop a content checklist around graduating to the next stage of life which could include how to prepare for university, budgeting for the future, and product-awareness ads around individual or student-based financial products.

Trigger:

Graduation is around the corner.

Key Insight:



of recent college graduates who are LinkedIn users try to shop around for financial products, (**compared to 33%** for the total population of school graduates from the past 12 months).

Post:

Apr

In-market:

Apr–May



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April

Congrats Grads!

Celebrate Small Business Lenders

Spring Federal Rate Update



Celebrate Small Business Lenders

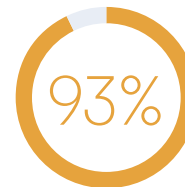


As a part of National Small Business Week, there is the potential to focus on the Lender of the Year award which honors financial institutions, including those that provide financing for small business exporters and inner-city businesses. As small businesses work to survive in a volatile market, use content to stand out as a compassionate and helpful advisor.

Trigger:

National Small Business Week is typically the first week of May.

Key Insight:



Small businesses that promote on LinkedIn are **93% more likely** to have an existing Small Business Administration loan.

Post:

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In-market:

Apr–May



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April

Congrats Grads!

Celebrate Small Business Lenders

Spring Federal Rate Update

Spring Federal Rate Update



When the fed rate is announced, consider activating educational material around mortgage provider products that encourages consumers to take control of their financial future.

Trigger:

Searches for “fed rate” peak for spring.

Key Insight:



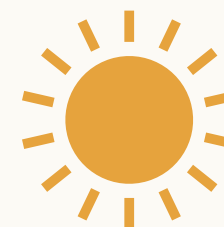
LinkedIn users with a mortgage are **25% more likely** to research their mortgage through online search.

Post:

Apr

In-market:

Apr–May



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May

Pride Month

Job Hunting Advice

Time Well Spent Guide

Pride Month

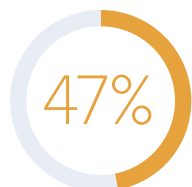


Companies looking to stand out from the crowd may consider promoting awareness articles around LGBT financial products. Activate ads that highlight customer pain points, product benefits, gaps in the market, and alternative product disadvantages.

Trigger:

June is Pride Month.

Key Insight:



of the population who are gay, lesbian, bisexual or those who identify themselves as “other” feel knowledgeable about how to manage their personal finances.

Post:

May

In-market:

May–Jun



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Pride Month

Job Hunting Advice

Time Well Spent

Job Hunting Advice

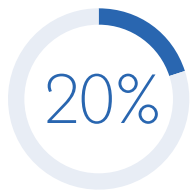


As many face an uncertain job market due to recent economic volatility, it's important to post content that is positive and insightful. Promote an infographic or guide about things to consider while job-hunting, such as what insurance is provided or what opportunities for growth the employer may provide.

Trigger:

Searches for "Glassdoor" peak.

Key Insight:



of adults who opened investment accounts in the past three years said that a job status change prompted them to apply.

Post:

May

In-market:

May–Jun



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Time Well Spent



Educate consumers on how building weekly financial habits can pay off in the long run. Showcase how much time people dedicate to sorting their finances and what products you can offer them to make it simpler, and think of content focused on optimizing financial habits during market volatility.

Key Insight:



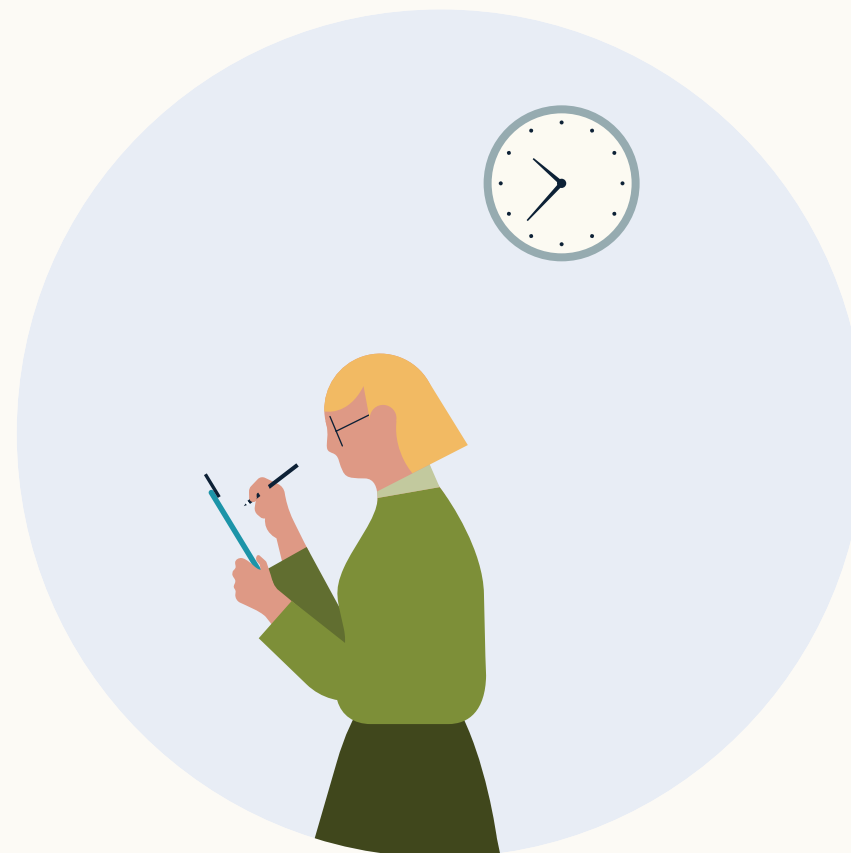
of LinkedIn users are regularly checking their credit score to manage their money, **17% more likely** than the total US population.

Post:

May

In-market:

May–Jun



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Purchasing a Home

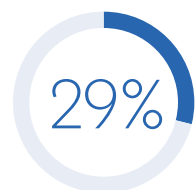


Consider creating a “Purchasing a Home Checklist” which includes relevant insurance products such as home insurance, contents insurance, life insurance (which can be a requirement of some loans), loans, credit cards, and tips on how to build a great credit profile.

Trigger:

Searches about purchasing a home peak.

Key Insight:



of people who are moving homes apply for home insurance.

Post:

Jun

In-market:

Jun–Jul



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Credit Card Benefits

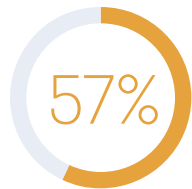


As credit card searches peak, activate ads around the benefits of membership, using cards over cash, and keeping good credit during unprecedented uncertainties.

Trigger:

“Credit score” searches peak.

Key Insight:



of consumers say the credit card-related information they are most interested in are the rewards and benefits offered.

Post:

Jun

In-market:

Jun–Jul



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Summer Pregnancies

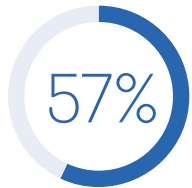


Take advantage of the summer “pregnancy” search peak and consider implementing change in lifestyle ads as a part of your content strategy.

Trigger:

Searches for “pregnancy test” peak.

Key Insight:



LinkedIn new parents aged 20–29 are **57% more receptive to social media advertising** than the general population.

Post:

Jun

In-market:

Jun–Jul



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Paying for College



As highschoolers are preparing to transition to college, summer is the perfect time to be educating consumers about your products related to student loans and financial planning.

Trigger:

“Student loan” and “college loan” searches peak.

Key Insight:



of consumers go online to research loans, but **only 30%** say this source of information is the “most helpful.”

Post:

Jul

In-market:

Jul–Aug



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July

Paying for College

Aligning Finances with Your Career

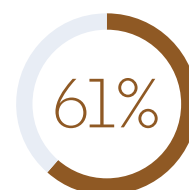


Aligning Finances with Your Career



Take a top-level view of how the sectors have shifted throughout the year and what new careers are on the horizon. Provide an overview of what financing may be needed when looking to up your skillset or a checklist reminder around what insurance products or benefits may be provided or needed for a new or changing job. This is also an opportunity to discuss recent economic uncertainties and how they relate to the current job market.

Key Insight:



Consumers who recently changed jobs are **61% more likely** to still not have insurance, and will need to get up to speed on what their new employers offer.

Post:

Jul

In-market:

Jul-Aug



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Divorce Financial Advice

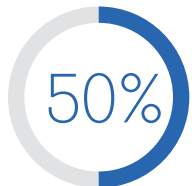


Consider a lifestyle campaign that tackles the difficult issues surrounding divorce, such as hiring a lawyer, how assets can be split, what counts as an asset, what financial considerations should be taken into account (such as shared bank accounts), and what financial help you can offer.

Trigger:

Searches for “divorce lawyer” peak for summer.

Key Insight:



of those who got divorced or separated in the past 12 months feel anxious about their financial situation, **42% more likely** than the total US population.

Post:

Aug

In-market:

Aug–Sep



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Dec



Summer Federal Rate Update



Consider activating articles on how the fed rate rise or fall has previously affected the economy, credit cards, mortgages, and borrowing.

Trigger:

Mid-year peak of searches for “fed rate.”

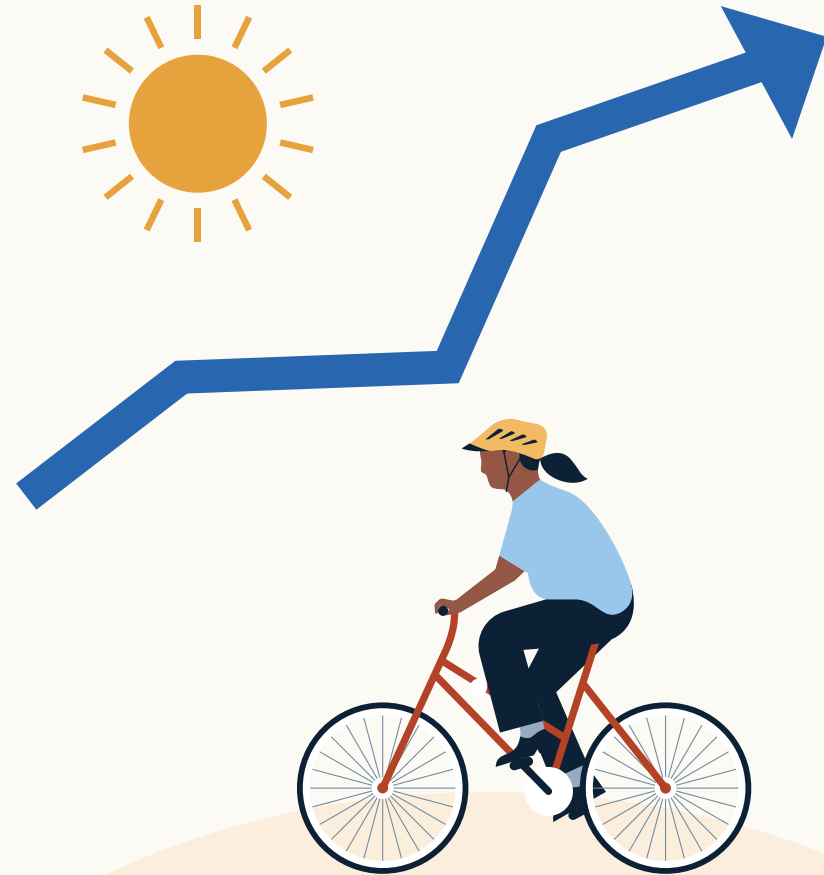
Lowered rates are appealing:

“I am seeing what mortgage refinance rates are. They seem to be lower... but if only you could do all that online without having to have in-person meetings!”

– Female 30–34

Source: Forrester Consumer Voices MROC, Q1 2020 US

Post: Aug
In-market: Aug–Sep



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Election Fever

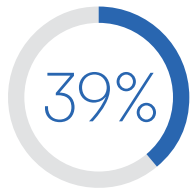


During elections, share content that is light in tone and avoids being overly political. Consider a piece about people's financial literacy surrounding a general economic policy.

Trigger:

Upcoming elections.

Key Insight:



of the total US online adult population have seen ads for political campaigns on social media, **56% for LinkedIn users.**

Post:

Sep

In-market:

Sep–Oct



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Cyber Security Awareness

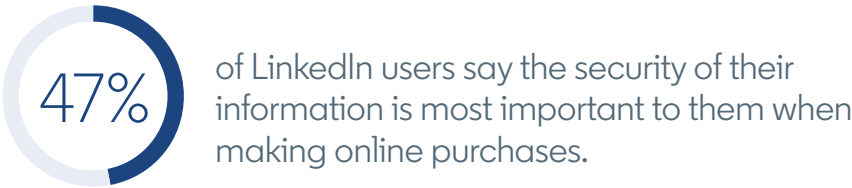


As consumers prepare for the holiday season, it’s important to consider risks and ways to protect financial information. Promote articles around recent scams and how to avoid falling for them, what measures a financial provider may take, and what guarantees they can provide for protecting accounts.

Trigger:

October is National Cyber-Security Awareness Month.

Key Insight:



Post:
 Sep

In-market:
 Sep–Oct





Black Friday



As Black Friday approaches, get involved by promoting product awareness and benefits and help consumers choose a great financial product that can set them up with savings and investments for the rest of the year.

Trigger:

Black Friday sales.

Key Insight:



of LinkedIn users create a budget and keep track of it, **28% more than the total US population.**

Post:

Oct

In-market:

Oct–Nov



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Fall Federal Rate Update



Interest rate / APR is a key factor in choosing mortgages and loan products so consider promoting product awareness when the fed rate searches peak in the fall.

Trigger:

"Fed rate" searches peak for fall.

Key Insight:



Interest rate/APR is a key factor in choosing mortgages and loan products.¹

Post:

Nov

In-market:

Nov–Dec



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‘Tis the Season

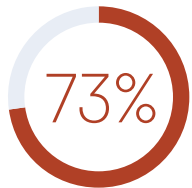


During the holidays, consumers are thinking a lot about buying, borrowing, and saving. Consider ads on how to spend wisely during the holiday seasons, and what alternative options exist for holiday saving and borrowing.

Trigger:

The holiday season.

Key Insight:



of consumers say they go online to research credit cards.

Post:

Nov

In-market:

Nov–Dec



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Contributing to Your IRA



Consider ads on how to save and invest money to transfer to your IRA contribution, what the deadlines are, the differences between a traditional and ROTH IRA, the limits for the year, and alternative products, e.g. if you have contributed the maximum amount, where else should you invest your money?

Trigger:

Searches for “IRA contribution” peak.

Key Insight:



of consumers research IRAs independently while **23%** speak with a financial advisor.

Post:

Nov

In-market:

Nov–Dec

“The pandemic has impacted the stock market and by extension our IRA retirement fund. We're not doing anything different. We have consulted with our financial adviser, she's been very helpful.”

– Female 65+

Source: Forrester Consumer Voices MROC, Q1 2020 US



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New Year's Savings

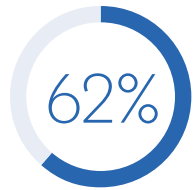


At the beginning of the new year, interest in saving grows, so promote content that helps your audience make the right saving decisions.

Trigger:

"Savings account" searches peak.

Key Insight:



of adults are likely to open an additional bank account with their current provider at the start of the year.

Post:

Dec

In-market:

Dec-Jan



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Bonus Season



During bonus season, your content calendar should include ways to spend your bonus, as well as investment information. Be sure to include “bonus season” in your keyword strategy and activate ads around investing.

Trigger:

Bonus season.

Key Insight:



of adults who opened investment accounts in the past three years had an existing relationship with the brand.

Post:

Dec

In-market:

Dec–Jan



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Dos and Don'ts of 401k Rollover

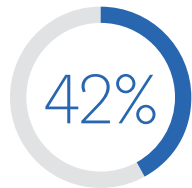


Consider promoting instructional articles on how to roll over a 401k, what to take into consideration, the dos and don'ts of 401k rollover, or infographics explaining what a rollover is for first-timers and what it means for savings.

Trigger:

Searches for "401k rollover" peak.

Key Insight:



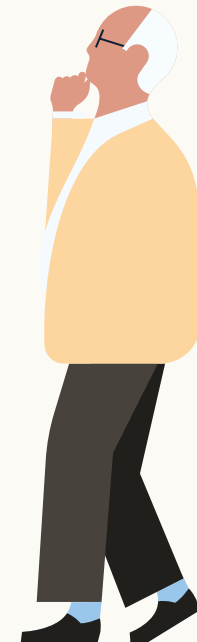
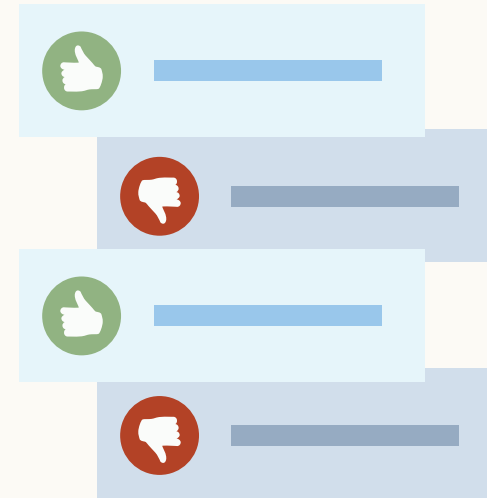
of the total US online adult population plan to finance their retirement through an employer-sponsored retirement account (e.g., 401k).

Post:

Dec

In-market:

Dec-Jan



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Preparing for Tax Season



During tax season, consumers are looking for educational “how to” content. Consider advice-based ads, infographics, and product demos that demonstrate your value-add.

Trigger:

“Tax” searches peak.

Key Insight:



of LinkedIn users have prepared their taxes last year using a software installed on their computers, **25% more likely** than the total US population.

Post:

Dec

In-market:

Dec–Jan



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Thank you for reading the Financial Services Marketing Seasonal Spend Calendar!

Now, it's time to start putting these insights to work. You'll find more research to leverage at our [resource hub](#).

