







401(k) Boost Calendar & Checklist 2026

Getting your employees engaged in your retirement plan can be challenging. Use this calendar and downloadable financial wellness resources to educate them and help increase participation.







JANUARY Set Retirement Goals <ul style="list-style-type: none">• A goals-based approach to retirement planning is best• Give your employees tips with our email template	FEBRUARY February Feedback <ul style="list-style-type: none">• Send a survey to your employees to rate your plan• You can use the survey template in our resource library	MARCH Savings & Taxes <ul style="list-style-type: none">• How employees save for retirement affects taxes now and in the future• Our email and one-pager can help educate them	APRIL Financial Literacy Month <ul style="list-style-type: none">• Retirement planning terms can be confusing• Our email and video can inform them
MAY Maximize Your Match <ul style="list-style-type: none">• Define your company's match with employees• Explain how maximizing that match helps them	JUNE Mid-Year Check-In <ul style="list-style-type: none">• Employees should meet with a financial advisor at least once per year• Our video shows when to change investments	JULY Future Independence <ul style="list-style-type: none">• Financial freedom at retirement depends on many factors• Your employee's savings rate tops that list	AUGUST Navigating Volatility <ul style="list-style-type: none">• Market volatility is not a matter of if, but when• Our article offers tips to avoid emotional investment decisions
SEPTEMBER National 401(k) Day <ul style="list-style-type: none">• Celebrate on September 5• Show employees how they can control their retirement planning	OCTOBER Financial Planning Day <ul style="list-style-type: none">• Celebrate on October 1• Teach your employees about the benefits of compound growth	NOVEMBER Simplify Enrollment <ul style="list-style-type: none">• Remove any employee enrollment barriers• Share our Take Charge Checklist with employees	DECEMBER Provide Planning Tools <ul style="list-style-type: none">• Empower your employees with budgeting tools• Help them take control of their retirement savings

Month	Completed	Description
JANUARY	<input type="checkbox"/>	<p>It's the New Year and many people are making resolutions to make their lives better. A big way they can improve their future selves is by making retirement planning goals.</p> <p> Click here for an email template on this topic you can send to employees.</p> <p> Click here for a retirement calculator to help employees make realistic goals.</p>
FEBRUARY	<input type="checkbox"/>	<p>Feedback February is a great time to take the pulse of your employees' feelings about your retirement benefit while gauging their knowledge of the plan. The survey template and email linked below can get you started.</p> <p> Click here for an email template that you can send to employees.</p> <p> Click here for a survey template that you can attach to that email or send separately for feedback.</p>
MARCH	<input type="checkbox"/>	<p>A person's retirement savings has an effect on their taxes both now and in the future. Help your employees understand the difference between pre-tax (Traditional) and post-tax (Roth) contributions with our financial wellness email.</p> <p> Click here for an email template on this topic you can send to employees.</p> <p> Click here for a short article that further details the benefits of Traditional vs. Roth contributions.</p>



How to use this:







- Each month has a theme to keep employee content fresh and interesting
- Click any link to go to our Resource Library where you can access and download materials
- Pro Tip – Make this your own and customize the templates or order of content to fit your needs

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APRIL	<input type="checkbox"/>	<p>April is National Financial Literacy Month, and it's a great time to educate your employees on retirement plan basics. Our Glossary email template can be a good starting point.</p> <p> Click here for an email template on this topic you can send to employees.</p> <p> Click here for a short video you can share with employees titled "Retirement Strategies for Each Life Stage."</p>
MAY	<input type="checkbox"/>	<p>Your company's retirement plan match or profit-sharing option are big benefits to your employees, and they can compel some to begin saving. During Maximize Your Match Month, make it a point to communicate this benefit to your employees.</p> <p> Click here for an email template that you can send to employees.</p> <p> Click here for a short article that outlines common employer match types.</p>
JUNE	<input type="checkbox"/>	<p>Annual check-ins with a retirement advisor are crucial for your employees to stay on track to meet their retirement goals. These check-ins give your employees the chance to seek advice, update goals, and more.</p> <p> Click here for an email template on this topic you can send to employees.</p> <p> Click here for a short video you can share with employees titled "When to Change Investments."</p>



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JULY	<input type="checkbox"/>	<p>Everyone wants the freedom to live comfortably during retirement, but to do so requires consistent saving during your working years. In July, employees should evaluate their savings rate and see if it's high enough to meet their goals.</p> <p> Click here for an email template on this topic you can send to employees.</p> <p> Click here for a chart that illustrates how saving just 1% more can impact your retirement.</p>
AUGUST	<input type="checkbox"/>	<p>Market volatility, when the stock market fluctuates up and down, is concerning for many investors and can happen at any time, even in bull markets. We have an article you can share to educate employees.</p> <p> Click here for an email template on this topic you can send to employees.</p> <p> Click here for a short article you can share with employees.</p>
SEPTEMBER	<input type="checkbox"/>	<p>National 401(k) Day on September 11 is a great time to spread the word about your plan with your employees. Promote it on your company's intranet or put posters and flyers in your breakroom listing the benefit of enrolling.</p> <p> Click here for an email template on this topic you can send to employees.</p> <p> Click here for a video you can share titled "4 Ways to Control Your Retirement Planning."</p>



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OCTOBER	<input type="checkbox"/>	<p>October 7 is another great date to put your retirement plan at top-of-mind. World Financial Planning Day gives you a great opportunity to talk about financial wellness topics like compound growth. Our email template can help.</p> <p> Click here for an email template on this topic you can send to employees.</p> <p> Click here for a short video you can share with employees titled “The Power of Compound Growth.”</p>
NOVEMBER	<input type="checkbox"/>	<p>To increase employee participation in your retirement plan, it’s important to make enrolling as easy as possible. Take an honest look at your enrollment process and remove any barriers if possible. Also consider auto-enrollment if available.</p> <p> Click here for an email template on this topic you can send to employees.</p> <p> Click here for a Take Charge Checklist that you can share with employees.</p>
DECEMBER	<input type="checkbox"/>	<p>As employees begin preparing for the new year ahead, December is a good time to provide them with budgeting calculators and tools so they can get an accurate picture of their financial situation and make attainable goals.</p> <p> Click here for an email template on this topic you can send to employees.</p> <p> Click here for a budgeting worksheet to help employees plan for the coming year.</p>



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Why Fisher\SMB

At Fisher\SMB, we've helped thousands of companies set their employees up for a comfortable retirement.

“Fisher\SMB plays a crucial role in our company retirement planning for our employees. Fisher\SMB promptly responds to our employee needs as they help them manage their retirement portfolio¹”

– Plan Administrator, Manufacturing Company

Employee Services Comparison	Current Advisor	Fisher\SMB Solution
Robust employee education program tailored to engage your employees		✓
Proactive enrollment support for newly eligible employees		✓
Tailored group education sessions for employees		✓
One-on-one meetings with employees to discuss retirement goals, investment selection, and more		✓
Service level guaranteed in writing for all plan services.		✓



Are your employees getting the support they need?

Setting your employees up for a comfortable retirement can be difficult, but help is available. Our 401(k) business specialists are ready to meet with you to discuss your unique needs and create an action plan to help.

[Schedule a consultation](#)

¹This testimonial was given by a current client. Testimonials are representative of client views at the time collected. Clients are not compensated financially or otherwise for testimonials. This case study is not representative of all clients' experience with Fisher\SMB and there is no guarantee that similar results will be achieved for other clients.