

2026-2027 Dates and Deadlines Calendar

October 1, 2026 – September 30, 2027

	Chapter Responsible Party	Item
Monthly Chapter Tasks	Chapter Board	• FORM 40 by 8/31/2027 • End-of-Year Financials by 11/4/2027
	Communications Director	• Send Chapter *EWI Connect** to Chapter members, firm executives and **ewi@ewiconnect.com**. *Refer to ewiconnect.com / Chapter Resource Guide / Chapter Board of Directors: Communications Director for list of items to consider including in newsletter
	Secretary	• Send Chapter Membership minutes to Chapter members for approval. • Send Chapter Membership and Chapter Board minutes to Corporate Secretary, Lori Heerlyn at Lori.Heerlyn@tdwilliamson.com.
	Treasurer	• Review reports from Corporate Office with renewal invoices to be sent to Representatives for accuracy in billing.
	Retention & Recruitment Director	**Mail via Postal/Email to Corporate:** • Application for Membership • Application for Chapter Life Membership • Replacement Representative • Firm Information Change Form-can be done online by representative in the Member Information Center or submitted via mail/email. **(Payments to the Corporate Office due within 30 days(in full) of submission. The chapter portion will be returned via ach to chapter bank accounts by 10th of following month)**

2026 October



Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
28	29	30	01 Notify the EWI Corporate Office of Scholarship Chair(s) if not on Form 40 that was due August 31. Host Board Retreat; Finalize Committee Appointments; Update *EWI Connect* masthead /website/letterhead with new Corporate and Chapter Boards	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	01
		Notes: Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				

Revised 11/2/2026

2026 November



Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
26	27	28	29	30	31	01
02 Due to the Corporate Office: 2026 YEAR-END Financial Reports*	03 Chapter President confirms with Committee Chairs that initial committee meetings are scheduled.	04	05	06	07	08
09	10	11 Coffee Chat with Corporate Call @ 12:00 PM CST	12 B/C/DP Training Call for 2026 Scholarship Program – see Resource Library for Call Information	13	14 Establish ASIST/EWISP contact list of agencies, schools, etc.	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	01	Notes: *Annual Operating Financial Report along with Affiliate letter (letter to be placed on Chapter letterhead and signed by Chapter President), Annual B/C/DP Financial Report; B/C/DP Financial Review Prepare a thank you letter and list of objectives for the coming year to be sent to members prior to dues renewal invoices being emailed as Anniversary Dates arise. Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				

2026 December



Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

Revised 11/2/2026

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
30	01	02	03	04	05	06
07 Post ASIST scholarship details on Chapter website with links to ASIST Scholarship*. Send letters to participating high schools for EWISP*	08	09	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	01	02	03
		Notes: *See training materials and Tool Kit in Resource Library Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				

2027 January



Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

Revised 11/2/2026

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
28	29	30	31	01 Follow-up with EWISP schools*. Select and secure EWISP and ASIST Judges. Chapter Board approval of Literacy Project.	02	03
04 Scholarship Applications open on Kaleidoscope.	05	06	07	08	09	10
11	12	13 Chapter Presidents' Call @ 12:00 PM CST	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Notes:

*As a reminder, send schools information about online application process with Kaleidoscope.

Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com

2027 February



Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

Revised 11/2/2026

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
01	02	03	04	05	06	07
08	09	10 Coffee Chat with Corporate Call @ 12:00 PM CST	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
		Notes: Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				

2027 March



Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY

Revised 11/2/2026

01	02 Due to the Corporate Office: Names and Email Addresses of 3 Chapter Judges for EWISP and ASIST	03	04	05	06	07
08	09	10 Chapter Presidents' Call @ 12:00 PM CST	11	12	13	14
15	16	17	18 Corporate In-person Board Meeting	19 Corporate In-person Board Meeting	20 Corporate In-person Board Meeting	21 Corporate In-person Board Meeting
22 Corporate Nominating Committee notifies members of opportunities to submit Corporate Board Applications	23	24 Review of applications for missing materials. Chapter has the option to contact applicant regarding missing materials.	25	26	27	28
29	30	31 *******Chapter EWISP/ASIST Scholarship Deadline - All student applications must be completed by this date by 11:59 PM CT.**********	01	02	03	04
		Notes: March = Consider Corporate Service and submitting an application; Consider who else in the Chapter qualifies to apply and encourage stepping into Corporate Leadership Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				

2027 April

Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

Revised 11/2/2026

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
29	30	31 .	01 LCAM 2027 - Registration Opens (Early Bird Pricing Until June 30). Review 2027 LJP Awards Criteria and Submit Nominations by July 9, 2027. Chapter Slate of Officers (Straw) ballots sent to members. Review of applications for missing materials. Chapter has the option to contact applicants regarding missing materials.	02 Chapter Judging begins for EWISP and ASIST and is open until May 7, 2027 – date for completion.	03	04
05	06	07	08	09	10	11
12	13	14 Coffee Chat with Corporate Call @ 12:00 PM CST	15	16	17	18
19	20	21 Deadline for submission of Proposed Bylaw Amendments**	22	23	24	25
26	27	28	29	30 Encourage LCAM 2027 attendance. Evaluate Straw Ballots received and begin preparing slate of officers for 2027-2028 board year.	01	02
		Notes: *Use Kaleidoscope evaluation and EWISP & ASIST Personal Interview - Judging Form **Please send all proposed bylaw amendments to Corporate Bylaws Committee to Vicki Chapman at vchapman@swbc.com using the Proposed Bylaw Amendment paperwork located in the Resource Library. Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com				

Revised 11/2/2026

2027 May



Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
26	27	28	29	30	01	02
03	04 Deadline for submission of application for Corporate Board position* 5 pm CST	05	06	07 Chapter EWISP and ASIST Judging closes	08	09
10 Notify EWISP/ASIST Winners	11	12 Chapter Presidents' Call @ 12:00 PM CST	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28 Deadline to submit Chapter EWISP/ASIST Scholarship Winners to Corporate Office** by 5 pm CST	29	30
31	01	Notes: *Email to members of the Corporate Nominating Committee and Nominating Committee Chair Vicki Chapman at vchapman@swbc.com. **Email to ewi@ewiconnect.com Submit Chapter Notification of Winner Form. *** Each applicant submission must include a letter of recommendation from the Chapter President or Chapter Scholarship Chair stating why the student should receive a Corporate Scholarship Award on Chapter Letterhead - 300-600 words. Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com Month of May - Plan Chapter Awards Banquet for EWISP Winners and sponsoring Teachers; notify winners, sponsors, and education providers of awards.				

Revised 11/2/2026

2027 June



Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
31	01	02	03	04	05	06
07 Present slate of Chapter Officers and Directors, and slate of Delegates and Alternates for acceptance by Chapter Board for upcoming year (2027-2028).	08	09 Coffee Chat with Corporate Call @ 12:00 PM CST	10 Corporate In-person Board Meeting	11 Corporate Scholarship Judging Period Opens Corporate In-person Board Meeting	12 Corporate In-person Board Meeting	13 Corporate In-person Board Meeting
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29 Corporate Scholarship Judging Period Closes	30	01	02	03	04

Notes:

Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com

Revised 11/2/2026

2027 July



Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
28	29	30	01 LCAM 2027 Early bird pricing expires Present slate of Officers and Directors to Membership for Approval Corporate Secretary to notify Chapters of number of Delegates and Votes per Chapter in Accordance with Bylaws.	02 Begin preparing Chapter Budget for 2027-2028 Operating Year	03	04
05	06 Chapters receive notification of Corporate EWISP/ASIST winners	07	08	09 Due to the Corporate Office - Chapter nominations for Lucille Johnson Perkins Awards and Chapter Communications Awards to the Corporate Awards Committee*	10	11
12	13	14 Chapter Presidents' Call @ 12:00 PM CST	15	16	17	18
19 60 DAY WINDOW CLOSES TODAY for Notice of Annual Meeting: Chapters receive Annual Meeting Delegate Packets from Corporate Office (60 Days prior to annual meeting)	20	21	22	23	24	25
26	27	28	29	30 Due to Corporate Office-Chapter of Excellence submissions by 5 pm CST	31	01

Notes: *Email to ewi@ewiconnect.com; Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com

2027 August



Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
26	27	28	29	30	31	01
02 **Chapter votes to determine if Delegates are 'informed and uninstructed' or 'informed and instructed'**	03 **Due to the Corporate Office: Student Verification of Enrollment (VOE) Forms to Submit Corporate. Scholarship Award Payments to Schools by 5 pm CST**	04	05	06	07	08
09	10	11 **Coffee Chat with Corporate Call @ 12:00 PM CST**	12	13 ***2027 LCAM Annual Bylaw/Budget Delegate Session Conference Call - 12:00pm CT***	14	15
16	17	18	19	20	21	22
23	24	25	26	27 **Due to the Corporate Office: Corporate Notification of Chapter Officers and Directors for 2027-2028 (Form 40)* by 5 pm CST** **Due to the Corporate Office: Delegate Notification Form AND Fees ($50 per delegate) All by 5 pm CST**	28	29
30	31	Notes: *** Email to ewi@ewiconnect.com** **Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com**				

Revised 11/2/2026

2027 September



Legend:
Corporate Office Deadline
Chapter Tasks
All Representatives
Attention to Date/Deadline
Recommendations

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
30	31	01 Chapter President Elect to assist outgoing President with plans for installation. Begin Year-End Financial Reports due to Corporate Office on 11/3/2027. Finalize plans for Reading Rally if holding one.	02 Communications directors send holiday message to representatives and member firms	03	04	05
06	07	08 Annual Delegate Training Call – 12:00 PM CT	09	10	11	12
13	14 Chapter President: Obtain proper bank resolution from forms in the Resource Library, for New Officers of Incoming Board to sign	15	16	17	18	19
20	21	22	23	24	25	26
27	28 Prepare for Board Retreat, include review of strategic plan, membership goals, transfer info to new board	29	30	01	02	03

2027 LCAM – Caesars Palace, Las Vegas, NV

Notes:

Due to the Corporate Office on Nov. 4, 2027: 2027 YEAR-END Financial Reports-Annual Operating Financial Report along with Affiliate letter (letter to be placed on Chapter letterhead and signed by Chapter President); Annual B/C/DP Financial Report; B/C/DP Financial Review
Send Chapter Membership and Board meeting minutes to Corporate Secretary, Lori Heerlyn at lori.heerlyn@tdwilliamson.com

Revised 11/2/2026