Client seminar planning worksheet

Use this worksheet to aid you in your client seminar planning process. It is designed to help you and your Regional Advisor Consultant evaluate your current book of business and client acquisition goals.

List your main goals for the client seminar:

1. ________________________________
2. ________________________________
3. ________________________________

Define the event logistics

1. At what date/time do you plan to host the event?

   ____

2. What is the location of the event?

   ____

3. Do you have a projected number of attendees?

   ____

4. Desired seminar topic?

   ____

5. Is travel required?

   YES NO

6. Is A/V needed?

   YES NO

7. If so, what types of connectors are required?

- ☐ VGA
- ☐ HDMI
- ☐ Other (please describe):

  ____

What is the audience type?

- ☐ COIs
- ☐ Current clients
- ☐ Beneficiaries
- ☐ Prospects
- ☐ Other (please describe):

  ____

Which demographics will be represented at the seminar?

- ☐ Baby Boomer
- ☐ Gen X
- ☐ Millennial
- ☐ Other (please describe):

  ____

Select your top three services provided by your practice to be highlighted at the event?

- ☐ Social Security planning
- ☐ Retirement savings/Income planning
- ☐ Investments
- ☐ Taxes
- ☐ Wealth transfer
- ☐ Other (please describe):

  ____

Make an inventory of your top clients to organize your attendee list

Consider having clients invite friends and family to the event for potential referral opportunities.

Client Name	Referral #1	Referral #2

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