



Seminar Checklist

- ✓ **BEFORE the event**
 - Decide Dinner Seminar or AFEA Workshop
 - Select venue (restaurant, college campus, library, conference room)
 - Select day/time
 - Secure venue (6+ weeks out)
 - Confirm direct mail/marketing (5-6+ weeks)
 - Check audio/visual needs
 - Screen
 - Projector (backup)
 - HDMI cord/power strip
 - Add contacts to database as they register
 - Confirmation calls (2 business days before)
 - Email database if you need to fill extra seats

- ✓ **DURING the event**
 - Show up early
 - Setup the room
 - Talk with staff about the event flow (seminar)
 - Be personable and professional
 - Share stories to engage the audience and help them relate
 - Strong closing statement with an easy way to schedule appointments

- ✓ **AFTER the event**
 - Update your database/email list with Response Sheet info
 - Call/email attendants within 24 hours to book appointments



Consider the **experience** from the perspective of a first-time guest.

How can you elevate the event to make it **more impactful** and **profitable**?





Elevate Your Seminars

Successful communicators connect with people through _____.

Stories help make abstract concepts _____ and _____ - people start to put themselves in the story.

Consider the types of stories you can add to your presentations (and meetings) to help clients understand and move forward.

What Stories Will You Tell?

Think of clients you have helped based on the following categories of stories you can share to help other clients and prospects.

What stories can you share based on the different:

- **Money Moves and Current Assets:**

- **Stages of Life:**

- **Retirement Goals and Objectives**
