

# Seminar Suite Checklist

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## Four to Six Weeks before the Seminar

- Choose the location and time of the seminar.**  
Decide the logistics of what you want to do. Consider whether the time and location is appropriate for the age of your audience.
- Create and email invitations.**  
Use the template that was provided to make an impact with your audience. **Submit the invitation to firm's compliance department for approval.** Don't forget to include the location, time and signature!
- Review the PowerPoint and speaker notes.**  
Include your contact information on the cover slide to brand yourself as an expert of this product and the solution it provides attendees. Save the PowerPoint to your computer and do a test run of the presentation.
- Order the Seminar Suite handouts.**  
To place an order, log into your designated portal.

**Reminder: Don't forget to get compliance approval status on materials from firm.**

*Tip: If you're short on time, print the worksheets and handouts yourself. Use 8.5" x 11" size letter paper and print in color, 2-sided. For a more professional look and feel, have your local copy shop print on card stock or quality paper.*

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## Week before the Seminar

- Review the PowerPoint.**  
Become very familiar with the script. Clients are attentive if you speak to them, rather than your speaker notes.
- Test the projector.**  
This is very important if you're using your own laptop and projector. If you're using the equipment provided by the venue, perform a test run on their equipment.
- Re-send the invitation to those who haven't responded.**  
Take a look at your attendee list; are there key clients who'll find this product interesting that haven't responded? Reach out to them again with the invitation template – personalized.

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## Two Days before the Seminar

- Confirm arrangements with the venue and provide the final head count.**  
*Tip: You might have to ask the venue to make a few extra chairs available in case you have people attend who didn't respond.*
- Do a run through of the presentation once more to check for timing and any mishaps that could arise.**
- Call to remind attendees of your seminar.**  
Remind them of the date, time and location.

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## Day of the Seminar

- Bring your calendar.
- Be ready to schedule appointments and follow ups!
- Arrive early.  
Make sure the room and arrangements are ready and in place.
- Test equipment.
- Have the PowerPoint up and set to the first slide of the presentation for clients to see when they arrive.
- At conclusion, ask for appointments.

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## Day after the Seminar

- Send each attendee a Thank You email using the template provided in the Seminar Suite kit.  
*Tip: You can do this with either an email or hand-written note.*
- Survey your attendees. Using the template provided in the Seminar Suite kit, take a snapshot of your seminar, to gauge the interest of the audience and your delivery.
- Call attendees who were “hot prospects” to schedule appointments (if you didn’t already schedule appointments with them at the conclusion of the seminar).

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## One to Two Weeks after the Seminar

- Call all attendees who haven’t yet scheduled an appointment. Follow-up is critical; it allows you to connect with your audience and show you sincerely care about their retirement strategy.
- Call invitees who did RSVP for the seminar, but did not show. Give them a brief overview of what they missed and set a personal meeting.

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Distributions of taxable amounts are subject to ordinary income tax and, if made before age 59½, may be subject to a 10% federal income tax penalty. Some broker/dealers and financial professionals may refer to the 10% federal income tax penalty as an “additional tax” or “additional income tax,” or use the terms interchangeably when discussing withdrawals taken prior to age 59½. Distributions of taxable amounts from a nonqualified annuity may also be subject to the 3.8% Unearned Income Medicare Contribution tax if your modified adjusted gross income exceeds the applicable threshold amount.

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