

# Hosting a Client Event



- 1. Choose a date** (preferably a Tuesday, Wednesday or Thursday) and **choose a special location** – a place where attendees will want to visit. Consider a historic hotel, museum, university with charm or history. Every community has special locations that can be reserved for events. Avoid holiday weeks and tax season for CPA's.
- 2. Choose a time.** Is a breakfast, lunch or late afternoon dinner meeting best? Avoid commuting hours.
- 3. Check with your favorite wholesalers to ask for their financial support of your event.** Many are willing to contribute toward the cost of the speaker's fee or cost of the meeting location and food. During the event, you can graciously thank them for their sponsorship and say a few words about their company.
- 4. Establish a guest/mailling list.** Do you want to do an event for client families and their heirs, or do you want to invite only the Centers of Influence in your community — or include both together? (Centers of Influence include CPA's, estate planning attorneys, trust officers, family office executives, art appraisers, insurance professionals, business managers, investment bankers and all others who work with families.)
- 5. Send a "Save the Date" card six weeks ahead of your event.**
- 6. Send an invitation with a stamped reply envelope 3 1/2 - 4 weeks ahead and follow-up with an email invitation.** Place an advertisement announcing your event in a local newspaper or publication, only if it is open to the public.
- 7. Call guests personally to confirm they received their invitation and to tell them why you think they will benefit by attending.** Encourage them to bring their spouse, children and professional advisors or friends who may be interested in the topic. Tell them they will receive a copy of the book *Preparing Heirs*.
- 8. Plan the menu for food/refreshments for your event.**
- 9. Secure all necessary equipment** (projector, screen, microphone if needed, etc.) If you can use your own laptop and projector, this will save on the rental expense.
- 10. One week ahead: As the host, prepare your own introduction.** Explain why you chose this topic for your audience and position your practice as a resource to help families become aware of the fact that 70% of all estates fail to transition successfully to heirs. Then explain that there are resources now available for families to prepare heirs to receive and manage assets successfully. The presentation will address how this can be done.
- 11. Three Days prior: Call or email clients as a reminder.**
  - Confirm their attendance, number of guests, location (include a map), time they should arrive and time it will end.
  - Verify where to park and whether parking will be validated.
  - Make sure CPA's know they will receive 1 hour CPE credit.
  - Confirm arrangements for food/refreshments.
  - Confirm the location and time with the featured speaker.
- 12. Two Days prior:** check on all logistics: verify menu, room location, equipment (laptop, projector, screen, microphone).
- 13. Day of Event:** Arrive early to set up and check laptop, projector and screen. Test the presentation and computer hook-up. Have guests sign-in on registration cards. Have CPA's sign in on a CPE registration form.
- 14. Host a Question and Answer period following the presentation.** Questions will be entertained for up to 30 minutes.
- 15. Follow-up.** Send a Thank You letter, then call to set up a meeting to review how the information might help their family or their advisory practice. Be sure and send the list of CPA's who attended to the Institute for Preparing Heirs so they receive CPE credit.