Step-By-Step Guide: Planning and Hosting Successful Events

As a financial professional, networking with prospects and strengthening relationships with current clients are key components to growing your book of business.

Hosting an event is a great opportunity to showcase your personality and the value you bring to your clients. However, events can take on a life of their own—if not planned and executed properly. The time and effort it can take to pull off a successful event can quickly feel overwhelming.

To help you and your staff seamlessly plan and host your next event, we've put together a variety of tools covering creative ideas and themes, timing of when to do what, and tips to make the event memorable.

Let's get started!

What's included in this guide?

- 4 secrets to make your event a hit
- 25 creative event hosting ideas
- Event Planning Checklist
- Building Relationships From Your Event Form
- Making the Most of Your Retirement Survey

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4 secrets to make your event a hit

With busy schedules, staying connected with clients and prospects can be challenging, but hosting events is a great way many financial professionals strengthen relationships and stay visible in their community.

So, what's holding you back from hosting an event?

Are you intimidated by the planning process? What if you could easily turn your next event into the talk of the town? Just think, your event could be a fun and creative outing where your clients are so excited that they ask to bring friends.

Are you worried about costs? Don't worry, there are plenty of low-cost event ideas you can try out. **These four secrets can help you get started.**

#1 Add a unique twist

While there are the "tried and true" event ideas, adding a twist can help your event stand out. Consider these ideas:

- Host a golf event that starts with putting lessons from a local golf pro.
- Host a dinner, but add on a wine tasting.
- Host a tailgating event, but pair it with a "VIP behind-the-scenes" tour of the school's athletics facility.

#2 Give back to the community

Your event can be fun and also be an engaging way to do good for the community. When your guests feel like they've made an impact in their community, your event will shine. Brainstorm ways to create a lighthearted event that helps you spend time with clients and prospects, while also donating time or money to a local organization. Consider these ideas:

- Host a chili cook-off where people cast votes by making donations to local organizations.
- Host an event with a local organization where the price of admission is donated to the participating groups.
- Host a clean-up day where people volunteer and at the end of the day you provide food and beverages for everyone at your office.

#3 Think smaller

"The bigger the event the better" may not always be the best approach. Consider limiting your event to a smaller number of attendees. Smaller attendance sizes can give you the opportunity for quality "face time" with each attendee.

#4 Invite a local "celebrity" guest

Brainstorm connections you may have. Do you know any subject matter experts, prominent business leaders, retired athletes, or local university or sports team staff? Inviting a well-connected local leader or a popular coach to participate in your event can be a great way to create a memorable experience.

Thinking outside the box can lead to hosting an event that clients and their friends rave about and, in turn, help them remember you in the future.

Looking for additional creative ideas?

Continue to 25 creative event hosting ideas ›

25 creative event hosting ideas

Thinking of that "break-through" idea may not come to mind so easily. These 25 creative ideas can help you leave a lasting impression on your clients and prospects.

Seasonal ideas

Spring

Earth Day – Work with local parks and recreation boards to identify local parks that might need help planting trees or shrubs. Invite clients and their children/grandchildren to plant trees in a park you adopted, and host a complimentary breakfast or lunch as a thank-you and an opportunity to talk one-on-one.

Baseball Opening Day celebration – Contact a local baseball team to arrange tickets to the opening home game. Including a "behind the scenes" tour of the facilities can be a fun add-on.

Spring forward at the zoo – Arrange an event for clients and children/grandchildren at a local zoo. Set up special hours for the visit and hands-on experiences with various animals. Include a zoo picnic at the end for all attendees.

Master gardener workshop – Set up a tour and lesson with a local master gardener. Highlight local gardens and include practical suggestions for attendees to make the most of their landscaping.

Summer

Cornhole (bags) tournament – Host a cornhole tournament and fun dinner for your clients with a wide range of prizes for participants.

Ultimate golf tournament – Set up a tournament that starts with individualized putting or long drive lessons. Encourage participants to practice what they learned in lessons during a short tournament. Include a long drive event for those who participated in those lessons and a putting event for those who participated in the putting lesson.

Summer BBQ cook-off – Invite your clients to team up with prominent chefs at local BBQ restaurants for a cook-off to benefit charity. Once you've identified the BBQ team, invite friends and family to expand the event. Include a silent auction to raise funds for a local food pantry.

Fall

Ultimate fan tailgate – Set up a tailgate at a popular local university or college. Work with the athletic department to arrange a visit by the school mascot and perhaps the school marching band.

Haunted Halloween party – Celebrate Halloween with a costume party featuring a fun theme like "Ghosts and Ghouls" or "Witches and Warlocks." Include fun, themed appetizers and dinner servings along with prizes for best and worst costumes.

Pumpkin patch or apple orchard get-together – Work with a local pumpkin patch or apple orchard to set up a family day for your clients and their loved ones.

Event hosting ideas continued ›

Winter

Saturday with Santa – Set up a special Santa appearance including crafts and cookie decorating for the children. Games could include a reindeer guessing game and an invitation to write a letter to Santa.

Smart money resolution presentation – Ramp up for New Year resolutions with an informal presentation featuring a free dinner and a short overview on how clients/prospects could make smart choices now to put them in a good money position by the end of the year.

Presentation topic ideas

If you're thinking about hosting a lunch & learn, grab & go lunch, or dinner, but not sure what topic to present, we offer several ideas based on audience groups.

Millennials & Generation Xers

Is your number really small or super big?: Create a presentation focusing on the impact of time on investing. The goal is to educate on the power of compounded growth but still empower this audience with the knowledge that they have time to make a real difference.

Smart money choices today that could turn you into a millionaire later: Are your younger clients spending their money wisely? Keep your presentation short and high-level but offer suggestions on ways to save and ideas on how to prepare for the future. Don't pressure attendees for information, as this engagement opportunity is all about building relationships.

Pre-retirees

How close are you to your magic number?: Do you know the "magic number" that you'll need to retire? Are you almost there? How can you super-charge your savings to get you there quicker? This presentation is all about helping people who are just starting to think about retirement focus on their retirement goals.

The sandwich generation: Many of your prospects are trapped between caring for their parents and taking care of their children as they move to college. Help these people focus on the best ways to allocate their resources.

Retirees

Making your money last for every birthday – Many retirees worry about having to change their lifestyle in retirement due to savings. This event would revolve around ways retirees could avoid this situation. The goal is to find ways to celebrate getting older while providing assurance that there are options to deal with the situation they worry about.

Event hosting ideas continued ›

Women

Staying at home doesn't mean staying on the sidelines: Set up a series of events to help the women in your book of business feel valued, so they're not tempted to leave you when their partners pass away. With women outliving men, it's important to talk about strategies that can work for your female clients. It's crucial to note that stay-at-home parents should also be saving and investing for retirement.

Widows/widowers

Moving forward after loss: Consider having a small-group quarterly meeting of widow/widowers in your book of business. Bring in a counselor to facilitate each meeting. The goal in each meeting is to reassure the widow/widower that you're a safe space for them and for their money.

Multigenerational

Planning for the family's future: Consider setting up an option for multiple clients with large families. Inheritance issues can become complicated. As a result, highlighting high-level concerns and following up with family-level meetings may be a smart way to effectively manage money issues.

Still looking for event themes and ideas? **Consider these additional party ideas:**

- Continuing education breakfast targeted to audiences such as doctors, attorneys, and accountants
- Private cooking lesson followed by a group dinner
- Dinner co-sponsored by a local attorney or accountant
- Casino night
- Private boat cruise

Building relationships with current and future clients is an essential part of building your book of business. Hosting client events can be the perfect way to remind your clients of the value you add and get your name out into the community. While these 25 ideas are just that, ideas…you can expand on them to help make your event perfect. Additionally, check out the Event Planning Checklist beginning on the next page to help ensure steps aren't missed.

If you're looking for additional ways to host a successful event, connect with the Sammons Retirement Solutions® Sales Desk at 855-624-0201.

Continue to the checklist ›

Event Planning Checklist

Your guide to planning and hosting the perfect event

Hosting the perfect event takes planning and preparation. This checklist can help you and your staff stay on top of deadlines while also taking the stress out of event planning.

4–6 months before your event

Decide on your event goal:

- ☐ Will this be a large event where you invite all your clients and contacts, or are you going for a more personal, small group feel?
- ☐ Are there event themes that seem like a "natural" fit for the group?

Start penciling in event needs:

- ☐ Will you need a speaker?
- ☐ Will you need catering?
- ☐ Are there other considerations to keep in mind for your event?

Begin developing a budget:

- ☐ How many attendees are you estimating?
- ☐ Do you have relationships with partners or local businesses who might be able to donate a venue?
- ☐ Would funding potentially be available through business partners?

60–90 days before your event

Finalize event details:

- ☐ Confirm venue and caterer. Provide date, time, and attendance estimates.
- ☐ Reach out to the speaker you have reserved to make sure they still have your event on the calendar. Double-check to see if they need any additional details from you.
- ☐ Verify any partnership funding or agreements with local businesses.

Start getting the word out:

- ☐ If you're planning a large event, have staff call invitees with a friendly heads-up asking them to "save the date."
- ☐ If it's a smaller event, contact the invitation list with a personal "save the date" message.
- ☐ Depending on the guest list, include a short event note in your newsletter.
- ☐ Plan and begin printing invitations for the event.

Checklist continued ›

30–45 days before your event

Finalize any necessary compliance or partner handout approval:

- ☐ Get written sign-off on any presentation materials or handouts that will be used at the event.

Mail your written invitations:

- ☐ Before putting your invitations in the mail, be sure to double-check your list.

15 days before your event

Start gathering your final head count:

- ☐ Have a staff member call those who haven't responded to see who is attending and how many guests they are bringing. This can be an ideal time to encourage additional attendance with strategies like "[Financial professional name] wanted me to be sure to save you two extra tickets in case you wanted to bring friends."
- ☐ Verify contact information (especially email addresses) of attendees.

Touch base with your venue contact and caterer:

- ☐ Reach out with current head count estimates and confirm when they will need a final attendance number.
- ☐ Identify any audio/visual or WiFi needs.
- ☐ Work with the caterer and vendor to identify facility needs such as outlets and tables to serve food and/or drinks.

5 days before your event

Send an email with event details:

- ☐ Be sure to include date, time, location, and a high-level map to the event venue.
- ☐ Include any reminders.

Start putting together your "during event" and "post event" communications:

- ☐ Pre-address and stamp thank-you notes.
- ☐ Create client sign-in sheets.
- ☐ Assemble any attendee gifts.
- ☐ Have a staff member fill out the confirmed contact information for each attendee on the top of the Building Relationships From Your Event Form (found at the end of this guide). The rest of this form can be filled out for each attendee after the event.
- ☐ Assign a staff member to make sure you get photos during the events.

Checklist continued ›

During your event

Most importantly—HAVE FUN:

- [ ] This is the time to get to know your clients and their friends on a personal basis. In most cases, it's NOT about "shop talk."
- [ ] As you move between groups at your event, keep track of these conversations by inconspicuously writing reminders on small note cards you keep in your pocket.
- [ ] Be sure to thank any partners or sponsors of the event.

1 day after your event

Send thank-yous and make note of conversations:

- [ ] Use your note cards from the event to include a personal note in your thank-you to each attendee. If the attendee requested a follow-up call, be sure to make it right away.
- [ ] As you review your notes from the event, complete the rest of the Building Relationships From Your Event Form (found at the end of this guide) with details about attendees you'd like to remember long-term.

Document for compliance:

- [ ] Document attendees and any gifts they were given. Place these notes and receipts in the compliance folder for your event.
- [ ] Place a copy of the sign-in sheet in the event compliance folder. If required by your partners, email a copy of the sign-in sheet to them as well.

Ongoing follow-up

Send photos to attendees as soon as possible:

- [ ] Send individual emails with personalized photos for smaller groups of approximately 50 to 60. For larger events, after obtaining attendee consent, consider uploading photos to an online site and simply email a link to attendees.
- [ ] Events are not a "one and done" marketing tool. The relationships you build can continue for years as you nurture them. Follow up with articles pertaining to interests they shared.
- [ ] A great way to keep the conversation going is to send the Making the Most of Your Retirement Survey (found at the end of this guide) to all attendees after the event. Use this as another touch point in the weeks following, and set up time to discuss this with each person.

Now that you have your checklist down, be sure to check out the **Building Relationships From Your Event Form** to help develop stronger relationships with your clients and prospects.

Continue to the Building Relationships From Your Event Form ›

Building Relationships From Your Event Form

Use this form to help you and your staff build stronger relationships with clients and prospects. Your staff can fill in contact information prior to the event. Then use this form the day after the event to help document conversations and follow-up opportunities.

Contact information:

Name: ______________________________

Phone: ______________________ Email: ______________________

Address: ______________________________

____

Employer:

☐ Former Employer/Retired

Company: ______________________________

Job: ______________________ # of Years: ______________________

How long lived in the area:

☐ Most of life ☐ 10+ years ☐ 5+ years ☐ Recently moved

Notes: ______________________________

____

School affinity:

High School: ______________________ University: ______________________

Kids'/Grandkids' School(s): ______________________________

Notes: ______________________________

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Retirement status:

☐ More than 3 years away ☐ Retiring within 3 years ☐ Already retired

Notes: ______________________________

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Retirement readiness:

☐ Feels comfortable with retirement savings ☐ Not sure their current savings is enough ☐ Seems concerned/ unprepared

Notes: ______________________________

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Follow-up opportunities:

- ☐ Retirement savings
- ☐ Financial review
- ☐ Balancing college savings & retirement
- ☐ Finances of caring for parents/family members
- ☐ Making sure they don't outlive savings
- ☐ Other: ______________________________

____

Connections with current clients:

Name: ______________________ Relation: ______________________

Name: ______________________ Relation: ______________________

Name: ______________________ Relation: ______________________

☐ None

Family connections:

Parents: ______________________________

Notes: ______________________________

Siblings: ______________________________

Notes: ______________________________

In-Laws: ______________________________

Notes: ______________________________

Adult Children/Grandchildren: ______________________________

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Notes: ______________________________

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