REVISOR

ADVISOR RESOURCES / SEMINAR PLAYBOOK

Estate Planning Seminar Checklist

Work backward from your seminar date and check items off as you go. Each campaign runs two sessions, so keep one copy per event.

6+ WEEKS OUT	WEEKS 6 TO 1	EVENT WEEK	UP TO 2 WEEKS AFTER
Prepare	**Promote**	**Host**	**Follow Up**
Deck, venue, direct mail	Invites, RSVPs, venue thanks	Materials, calls, room setup	Calls, texts, CRM

1 Create the Presentation

6+ WEEKS OUT

- [ ] Insert logos, names and photos into the PowerPoint template, or build a new deck
  Use the sample presentation as your starting point.
- [ ] Cover the main talking points
  See the talking points checklist at the end of this guide.

2 Book the Venue

NO LATER THAN 6 WEEKS BEFORE THE SEMINARS

- [ ] Identify and book an ideal venue
  Libraries are preferred. Senior centers can also work, depending on capacity and open hours.
- [ ] Confirm capacity
  Ideal: a room for up to 75 in case of exceptional attendance. Minimum: 50.
- [ ] Schedule two separate events
  Same day, or separate days within 2–3 business days of each other at most.
- [ ] Set the times: one session at 1:30pm and one at 6:30pm
- [ ] Choose Monday–Thursday
  Try to avoid Thursday 6:30pm.

3 Coordinate the Direct Mail Order

TYPICAL LEAD TIME 6 WEEKS; BARE MINIMUM 4 WEEKS

- [ ] Provide finalized dates and the specific venue you reserved
- [ ] Request an email version of the campaign
- [ ] Review the proofs
  It takes a few business days to prepare everything.
- [ ] Approve the proofs and submit payment
  The marketing campaign starts after payment.
- [ ] Plan to reuse the venue
  You can usually use the same venue 5–6 times. Each mailing reaches 5,000 pieces to a new audience.

4 Send Invites and Monitor Progress

WEEKS LEADING UP TO THE SEMINARS

- [ ] Invite prospects from every system
  Previous seminar attendees, tax clients whose assets you don't manage, accountant-recommended tax clients, and local prospects.
- [ ] Update the email template before sending
  Update times and location, and attach the PDF email invite.
- [ ] Monitor RSVPs daily
  Pay closest attention to any messages from potential attendees.
- [ ] Watch your personal email
  Responses may arrive from other channels, such as accountant referrals.

5 Thank the Venue Staff

BEFORE AND AT THE EVENT

- [ ] Plan raffle prizes or gifts for venue employees
  Generic Visa gift cards or gift cards to nice local restaurants. Venue staff who love you speak well of you to potential attendees.
- [ ] Always include a gift if the seminar wraps up as the venue closes

6 Finalize the Event

1–3 BUSINESS DAYS BEFORE

- [ ] Attendee report
- [ ] Attendee evaluation sheets
- [ ] Attendee note sheets
  One note sheet per person.
- [ ] Firm marketing packet
- [ ] Business cards
- [ ] Pens
- [ ] Bottles of water and/or coffee

7 Day of the Event

MORNING OF, THEN 30–60 MINUTES BEFORE START

- [ ] Call every registrant for that session the morning of
  You may skip people who already confirmed the day before or the day of.

CONFIRMATION CALL SCRIPT

"This is **[Name]** from **[Firm Name]**, and I just wanted to confirm your attendance at our estate planning seminar at **[Venue]** and see if you had any last-minute questions for us." Use the same wording for voicemails.

- [ ] Arrive 30–60 minutes early
  Closer to 60 if another event precedes yours.
- [ ] Set chairs to match the number registered
  If the first session has 55 registered but the evening one has 25, remove chairs so it never looks like a poor turnout.
- [ ] Set up the smart board or presentation screen
- [ ] Set up a staff area at the back
  Pens, papers, business cards and other materials go here.
- [ ] Assign a dedicated person to check in everyone who arrives
  It creates warmth at the start of the relationship and records who actually attends.

8 Follow Up

DAY AFTER THROUGH 2 WEEKS AFTER

- [ ] Scan the attendee evaluation sheets into your computer as soon as possible
- [ ] **First follow-up (day after):** call everyone who wants a free consultation

- [ ] Also reach out to attendees who were unsure about a consultation
  Let them know the invitation is standing and does not expire.
- [ ] If there's no answer, leave a voicemail and send a text
- [ ] **Second follow-up (3 business days later):** call anyone who hasn't responded or scheduled
  Leave a voicemail only if they don't answer.
- [ ] **Third follow-up (5 business days after the first calls):** text anyone who hasn't responded or scheduled
- [ ] **Final (1–2 weeks after):** mark who attended vs. who did not
- [ ] Migrate all attendee data from recent seminars into your CRM
  Do this only after marking attendance.

SCRIPT FOR ATTENDEES WHO WERE UNSURE

"We wanted to thank you for attending our estate planning seminar, and we saw you marked that you were unsure if you wanted to take advantage of the free consultation. Is this something you wanted to explore now and get an introductory conversation set up at our office or over the phone?"

A Presentation Talking Points

USE AS YOUR DECK OUTLINE

- [ ] Introduce yourself and your team
- [ ] Give a general overview of what the audience will learn
- [ ] Summarize local trust laws and state rankings
- [ ] Share how many people have a will and trust
- [ ] Explain why audience members and their families might need an estate plan
  Give a few relevant scenarios, and show how proper estate planning addresses them.
- [ ] Overview IRA beneficiary trusts
  Explain what they enable the client to do.
- [ ] Address the most common questions
  For example: "What's better, a will or a trust?" Provide answers.
- [ ] Mention notable estate "non-planners"
  For example: Elvis Presley, Dr. Martin Luther King Jr.
- [ ] Overview the primary parties involved in a trust
- [ ] Tell those who already have a trust the main aspects it must include to be successful
- [ ] Thank the audience for joining and close with next steps
  Include consultation setup, any promotions, and a calendar link to schedule an appointment.