



### Workshop & Seminar Go-To Guide

As we progress into the third quarter of 2024, it's clear that workshop/seminar events and mailer campaigns are becoming a top marketing program yet again. Whether you've been doing them consistently, switching to a new topic, or starting them for the first time, we've created a document that has everything you need to have a successful event.

#### Latest PMP Files:

- [1st Quarter Marketing Plan for 2024](#)
- [2023 New Mailer Proofs](#)
- [Increasing RSVPs & Attendance Tips](#)
- [Leadjig New Features](#)
- [Dinner Seminars vs. Educational Workshops](#)
- [Workshop & Webinar Analytics](#)
- [Mailer Inserts](#)

#### Essential Documents for Setting Up Event:

- [LeadJig + Acquire Direct 2024 Calendar](#)
- [Venue Search Tutorial](#)
- [Venue Recommendations](#)
- [Venue Questionnaire](#)
- [Workshop Checklist](#)

- [Workshop Checklist Tutorial](#)
- [Getting Started with Leadjig Tutorial](#)
- [Educational Workshop Checklist](#)
- [Educational Workshop Checklist Video Tutorial](#)
- [Dinner Seminar Checklist](#)
- [Dinner Seminar Checklist Video Tutorial](#)

### Workshop PowerPoint Materials:

- Estate Planning:
  - [PowerPoint](#)
  - [Script](#)
- Understanding IRAs:
  - [PowerPoint](#)
  - [Script](#)
- IRA & 401K Mistakes/Retiring in Recession:
  - [PowerPoint](#)
- RMDs:
  - [PowerPoint](#)
  - [Script](#)
- Social Security:
  - [PowerPoint](#)
  - [Script](#)

### Workshop Call Scripts:

- [Appointment Setting Cheat Sheet](#)
- [Overcoming Objections](#)
- [Workshop Post Event Survey](#)
- [Scheduling Appointments](#)
- [Appointment Confirmation](#)

- [Generic Confirmation](#)
- [Generic Follow Up](#)
- Estate Planning:
  - [Confirmation Call Script](#)
  - [Pest Script](#)
- Understanding IRAs:
  - [Confirmation Call Script](#)
  - [Pest Script](#)
- IRA & 401K Mistakes:
  - [Confirmation Call Script](#)
  - [Pest Script](#)
- RMDs:
  - [Confirmation Call Script](#)
  - [Pest Script](#)
- Recession in Retirement:
  - [Confirmation Call Script](#)
  - [Pest Script](#)
- Social Security:
  - [Confirmation Call Script](#)
  - [Pest Script](#)

## Letter & Email Templates:

- Estate Planning:
  - [Follow Up Email](#)
  - [Confirmation Letter](#)
- Understanding IRAs:
  - [Follow Up Email](#)
  - [Confirmation Letter](#)
- IRAs & 401K Mistakes:
  - [Follow Up Email](#)
  - [Confirmation Letter](#)
- RMDs:
  - [Follow Up Email](#)
  - [Confirmation Letter](#)

- **Recession in Retirement:**
  - [Follow Up Email](#)
  - [Confirmation Letter](#)
- **Social Security:**
  - [Follow Up Email](#)
  - [Confirmation Letter](#)

If you have additional questions on these topics or like to schedule a call with our Practice Management Coach, Abby Kladvko, please contact Daniela Araujo at (954) 870-6717 or email her at [daraujo@advisorsacademy.com](mailto:daraujo@advisorsacademy.com).



**500 West Cypress Creek Road, Suite 250, Ft. Lauderdale, FL 33309**

Phone: (954) 870-6712 | Fax: (954) 530-4386 | Toll-free: (877) 399-1933  
support@advisorsacademy.com | www.advisorsacademy.com

Investment Advisory Services offered through Sound Income Strategies, LLC, an SEC Registered Investment Advisory Firm. Advisors' Academy, LLC and Sound Income Strategies, LLC are associated entities.