



INSTITUTE *for* PREPARING HEIRS

GUIDE TO HOSTING AN EXCEPTIONAL CLIENT FAMILY EVENT

1. **Contact Institute for Preparing Heirs® Speakers Bureau** to schedule your speaker at least 4-6 months prior to your event.
2. **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 CPAs.
3. **Choose a time.** Is a breakfast, lunch or late afternoon meeting best? Avoid commuting hours.
4. **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.
5. **Establish a guest/mailling list.** Do you want to do an event for client families? Do you want to invite clients' other professional advisors (CPAs, estate planning attorneys, trust officers, family office executives, art appraisers, insurance advisors, business managers, investment bankers and all others who work with families.)
6. **Send a "Save the Date" card six weeks ahead of your event.**
7. **Send the 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.
8. **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. Consider giving guests a complimentary copy of *Preparing Heirs* with a custom label; tell guests they will receive a copy by attending. (Ask Institute for Preparing Heirs about other hand-outs appropriate for your event.)
9. **Plan the menu for food/refreshments for your event.**
10. **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.
11. **One week ahead: As the host, prepare your introduction for the event.** Explain why you chose this topic for your audience and position your practice as a resource on topics that address wealth transfer in families and how to prepare for success.
12. **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.
 - Confirm arrangements for food/refreshments.
 - Confirm the location and time with the featured speaker.
13. **Two Days prior – Check on all logistics:** Verify menu, room location, equipment (laptop, projector, screen, microphone)
14. **Day of Event – Arrive early to set up:** Check laptop, projector and screen. Allow time for the speaker to test the presentation. Have guests sign-in on registration cards.
15. **Host a Question and Answer period following the presentation.** Questions will be entertained for up to 30 minutes.
16. **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.

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How long should the event presentation last?

Never more than one hour with an additional 30 minutes for questions. It is designed for busy people.

How many should be invited to attend?

It can vary in size, depending upon the needs and make-up of the audience. For example, a presentation may be conducted for a single high net worth family at their home or given to 50-100 client families and/or their professional advisors in a hotel setting.

What does the presentation portion of the event consist of?

The presentation typically begins with the “host” professional advisor giving a brief “welcome” followed by the purpose of the talk and the introduction of the guest speaker. The presentation itself consists of a PowerPoint presentation (colorful, lively, simple), individual handouts (distributed prior to the presentation), and the speaker remaining after to entertain questions while refreshments are served. Handouts may include copies of the book *Preparing Heirs* or *Philanthropy Heirs & Values* along with educational materials to help prepare a family for the successful transition of wealth to the next generation.

What does a client event cost?

There are three cost elements:

1. Speaker's fee and travel expenses
2. Invitations and postage
3. Location, equipment rental and food

How to share/control costs?

Another idea is for professional groups to co-sponsor the event, especially if the groups already have a mutual and non-competitive relationship. For example, a major law firm, a major accounting firm and the professional advisor hosting may evenly split the costs and plan to each invite both current and potential clients. Another common practice is for the financial advisor to invite wholesalers to sponsor the event by contributing to the cost of the speakers, location and/or food.

What makes a successful event?

Four items make all the difference:

- A topic of interest to the entire client family – and other professional advisors
- An excellent speaker on the topic
- A judicious selection of non-conflicting date/time/place.
- Thoughtful inviting, follow up and planning at the proper times before the event.

Contact us at 626.389.8664 to discuss your event, topics, speakers, and fees.

