

The Gift of Answers® Workshop



Overview



The purpose of The Gift of Answers® Workshop is to attract new clients and provide valuable information to existing clients. The Workshop's objective is to help people do the things they haven't done.

Your Workshop is not about investments or economic conditions; it is about life and helping your attendees package up their thoughts, wishes and documents to provide the information their loved ones will need and cherish after they have gone. As soon as you get into the Workshop content, the audience will immediately see and understand the relevance of what you are talking about. They will see that you are really interested in helping them do something that they just haven't taken the time to do.

Your Workshop is a story about life and the issues that can arise after someone dies. It is a chance for your audience to relate to and connect with your stories and experiences. Most of the attendees have experienced a death in the family, such as a parent or grandparent and they know how much work goes into wrapping up financial affairs: from paying bills, canceling credit cards, ending leases, distributing property and heirlooms, filing documents with the probate court and collecting benefits. The Workshop is an opportunity to help people sort out their own thoughts and wishes, and organize their important papers so that the people who are left behind have the vital information and resources to move on with their lives.

This Workshop does not have to be an elaborate or expensive proposition. Have you ever had ten face to face appointments in a week? This Workshop is no more difficult; you just schedule the ten appointments for the same time. Your attendees will help you recruit new prospects to future meetings. It is so much easier for your attendees to refer others to your Workshops rather than to an "insurance agent" or "investment advisor." People are motivated to help others more than they are motivated to help you. This Workshop will differentiate you from everyone else and will bring people to you.

For Investment Professional Use Only - Not for use with customers in either written or oral form.

Initial Steps



Step 1: Target Audience (Client Event or Marketing Program)

Your best bets for the first couple of Workshops are your top 20 clients. Many advisors start with clients 11-20 for the first session and then invite the top 10 after they have had a chance to work the process and get comfortable. Some advisors prefer to start with new prospects and use the Workshops as a way to screen and uncover new clients.

Step 2: Develop a Workshop Calendar

Consider conducting two Workshops per month – one during the day and one in the evening. To attract the widest audience possible, schedule Workshops for older clients/prospects between the hours of 10 AM and 2 PM. This avoids rush hour traffic and night-time driving. Younger couples can be scheduled in the evening. For some clients, consider paying their babysitter costs. Avoid scheduling your Workshops on legal or religious holidays, graduation dates, school breaks, long weekends, election days, etc. Choose a midweek date — like Tuesday, Wednesday or Thursday.

Have your calendar available so that you can book client meetings immediately after the Workshop to book your clients while they are motivated to do something. Don't wait for the enthusiasm to wear off. The female spouse will be more inclined to set the meeting with you. They see the process as something for them, since they expect to be the "surviving spouse." Leave time between Workshops to follow-up with each attendee. After you become comfortable with the Workshop format, build a six month calendar and publish the dates on your website, Facebook or LinkedIn.

Step 3: Establish A Budget

The cost to put together these Workshops can be very inexpensive. Decide what you want to do and where you want to do it and then prepare a cost estimate. Items to include/consider:

- Meeting Invitations.
- Refreshments.
- Gifts - Fireproof Safes and or Books such as The Beneficiary Book, Family Love Letter, or Ethical Wills.
- Promotional Material such as coffee mugs, pens, or letter openers.
- Handout Materials such as Workshop binders
- Meeting Facilities.
- Mailing Costs.

Initial Steps (continued)



Step 3: Venue & Facilities

Decide if you will hold the meetings at your location or offsite.

If offsite, consider unique places such as an:

- Art Gallery.
- Country Club.
- Mansion.
- Landmark.
- Library
- Restaurant (upscale is always better).

The chosen location should be centrally located and only require a short drive for your attendees.

Hotels are usually well equipped to handle events. The selected site should have free parking or tickets that can be validated. Consider your audience; will they be comfortable in your office conference room, or will they feel intimidated by the thought of going to your office to be “sold.”

Reserve the facility for 4 hours: 1 hour for set-up, 1.5 hours for the Workshop, ½ hour for follow-up and chit chat and 1 hour for clean up.

Step 4 – Speakers

Create a faculty of two or three attorneys whom you can rotate for your Workshops. An attorney will add credibility to your Workshop and add an element of compliance to keep you out of any unauthorized practice of law issues.

Attorneys will be more than willing to help you with the Workshops; they will likely develop several new clients from each Workshop.

Suggested topics for the attorney: (limit to 45 minutes):

- ✓ Probate & Wills.
- ✓ Revocable Living Trusts.
- ✓ Durable Power of Attorney.
- ✓ Health Care Directives.
- ✓ HIPAA Authorizations.

Make sure the attorney’s presentation is engaging and that there are a number of real life stories to punctuate the message. Remember, it is your Workshop – the attorney needs to meet your expectations and align with your objectives.

Sample Workshop Outline:

Topic	TimeLine
✓ Welcome, Introductions. And Overview	5 Minutes
✓ Value Proposition & Life Happens Stories.	5 Minutes
✓ The FireProof FileBox and Checklist	5 Minutes
✓ The Gift of Answers® BluePrint.	5 Minutes
✓ The Legal Side.	45 Minutes
✓ The Gift of Answers®.	10 Minutes
✓ Getting Started.	5 Minutes
✓ Close: Questions and Answers®.	10 Minutes

Handout Material

- ✓ Name Tags and Place Cards.
- ✓ Your Company Brochure and “About Us” Information.
- ✓ Program Folders.
- ✓ Workshop Workbooks
- ✓ FireProof File Box (optional).
- ✓ Fireproof FileBox Checklist.
- ✓ Gift of Answers® Blueprint.
- ✓ Getting Organized Article.
- ✓ Ten Don’ts Checklist.
- ✓ Life Happens Brochures (go to <http://www.lifehappens.org/reallifestories>)
- ✓ The Gift of Answers® pens, coffee mugs, letter openers, etc. (optional)

Other Materials

- ✓ PowerPoint Presentations (The Gift of Answers® and the Attorney's Presentation)
- ✓ Family Organizers and Disaster Planning.
- ✓ Attorney Handouts.
- ✓ Websites:
 - The Beneficiary Book: <http://www.active-insights.com/>
 - The Family Love Letter: <http://www.familyloveletter.com/>
 - Ethical Wills: <http://ethicalwill.com/>
 - Sample meeting and handout material can be found at www.addiewoods.com/articles.

Equipment

- ✓ Projector/Screen.
- ✓ White Board/Easel/Markers.
- ✓ Sound Equipment.
- ✓ Display Table with Brochures.

Workshop Scripts

- ✓ Welcome and Introductions.
- ✓ Overview of the program.
- ✓ Value Proposition & Life Happens Stories.
- ✓ The Gift of Answers® BluePrint.
- ✓ The FireProof FileBox and Checklist.
- ✓ The Legal Side.
- ✓ What if... Planning.
- ✓ Getting Started.
- ✓ Close and Questions and Answers.

Planning Timeline



Five Weeks Out

- ✓ Send meeting material to Compliance for approval.
- ✓ Book event facility.
- ✓ Decide on meeting room configuration (horseshoe style recommended).
- ✓ Arrange for refreshments/catering. Reserve event accessories and presentation equipment.
- ✓ Confirm date with guest speaker and obtain guest speaker biography.
- ✓ Develop guest list with a primary contact number for each member of the guest list.
- ✓ Put together a map and directions to the Workshop.

Four Weeks Out

- ✓ Send invitations to guests.
- ✓ Make sure staff is prepared to handle meeting inquires and RSVP calls.

Three Weeks Out

- ✓ Order approved event materials.
- ✓ Print handout material.
- ✓ Confirm all reservations (i.e. room, travel, menu).
- ✓ Confirm with guest speaker: presentation timeline & supplementary handout materials.

Two Weeks Out

- ✓ Send out confirmation letter to RSVPs
- ✓ Call those who have not RSVP'd: leave messages

Planning Timeline (continued)



One Week Out

- ✓ Rehearse Workshop content.
- ✓ Mail out confirmation letters to late respondents.
- ✓ Email reminder to guests.
- ✓ Get a final guest count and confirm headcount with meeting facility.
- ✓ Prepare name tags and table tent for each attendee.
- ✓ Prepare signage for meeting.

Two Days Prior

- ✓ Organize content for event folders (insert handouts, business cards and brochures).
- ✓ Print name table tents or create seating chart. Have additional table tents and name tags for those who are attending but didn't RSVP
- ✓ Final rehearsal of Workshop content.
- ✓ Confirm speaker and speaker's timing (time limit – 45 Minutes).
- ✓ Confirm final guest count.
- ✓ Confirm catering/refreshments and room reservation.
- ✓ Brief staff on their specific roles during the Workshop.
- ✓ Prepare a backup kit for event: pens, paper, batteries, easels, markers light bulbs, etc.
- ✓ Have a backup with hard copies of presentation and materials in case of equipment failure.

Day of Workshop

- ✓ Arrive early for preparation and early guest check-in.
- ✓ Have attendance list.
- ✓ Count handouts (ensure there are extras).
- ✓ Have name tent cards available and alphabetized.
- ✓ Post signage to direct attendees to location.
- ✓ Have writing utensils & materials available.
- ✓ Have a camera to take pictures during the Workshop.

Planning Timeline (continued)



Day after Workshop

- ✓ Send thank-you letters to all attendees.
- ✓ Call attendees who indicated interest in complimentary consultation.

One Week after Workshop

- ✓ Send “**Remember the Workshop**” letter with collection of photos from the meeting (Send by email or mail).
- ✓ Send “**We Missed You**” letter, including collection of photos, to those who were unable to attend.
- ✓ Begin tracking results and meeting expenses.

Sample “Remember The Workshop” Letter

Dear <name>,

Thank you for participating in The Gift of Answers® Workshop. Attached you will find a photo collection of the event. I am looking forward to working with you on your Gift of Answers® BluePrint and assisting you in any way possible.

The Workshop was a huge success; most people left with the feeling that it was informative and well worth their time.

Attached is a schedule of future Workshops. Please call my office if you think of anyone who should attend.

Sincerely,

<Agent/Advisor>

Sample “We Missed You!” Letter

Dear <name>,

We missed you at The Gift of Answers® Workshop. Mr. / Ms. <attorney name> gave an informative presentation about the legal side of planning. There was an interesting exchange of ideas and conversation about the subject matter. Most people found the question and answer period very helpful.

Everyone left with the feeling that it was a very good use of their time and most attendees will be recommending the Workshop to others.

We would love to have you attend one of our future meetings; the schedule is attached. Please call my office if you would like to attend.

Sincerely,

<Agent/Advisor>