Delight Your Clients *and* Prospects — Host an Enlightening, Engaging Event

KATHLEEN M. REHL, PH.D., CFP®, CeFT™

Rehl WEALTH COLLABORATIONS

We're here to support your important work with widows.

Kathleen@KathleenRehl.com

Blessings in your work assisting my "widowed sisters." They very much need your compassionate guidance.

Kathleen

~ Share the Love! ~

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Please reference Kathleen and her work, including *Moving Forward on Your Own: A Financial Guidebook for Widows,* when you share this publication.

You may also send others to her website at
www.KathleenRehl.com. ~Thanks!
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Delight Your Clients *and* Prospects

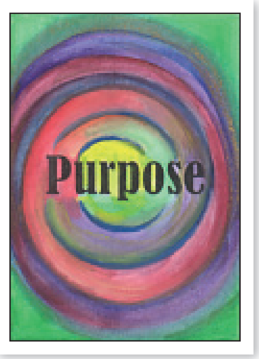
Host an Enlightening, Engaging Event

YOU'VE MADE A WISE DECISION to consider hosting an educational workshop for your clients and community. Women enjoy coming together to learn in a collaborative setting. When you attract, connect, and engage these women, you'll also enhance your position as an expert in working with widows.

This guide can help you plan an event that's productive and memorable—for those who attend and for your business. It's based on my experience in assisting with over a hundred workshops and presentations across the country during the past several years.

Let's start with some important questions that may help guide your initial planning.

1 What do you want to accomplish with this event?



- Are widows an important part of your client base now, or will they become a significant sector in the near future?
- Do you want to enhance community awareness about your firm?
- What actions do you hope the audience will take after attending your workshop?
- What's your budget?
- Are you trying to enhance relationships with other centers of influence who may be good referral sources for new clients?
- How will you involve your audience during the workshop? It's not a three-hour lecture.
- Will this be a small or a large event? If it will be smaller, host it at your office or other free location. You can be the speaker. (You'll also need to plan the presentation's content.) Bake brownies and bring beverages.
- If you want to host a unique event, with a polished presenter and award-winning author, consider collaborating with a speaker who may draw a bigger audience.
- Remember, this isn't a sales event for your company. Avoid laying out your fancy brochures. It's OK to have business cards in your pocket if someone asks for one. You certainly don't want to require participants to sign up for a meeting with you.

2 Who will attend?

If your goal focuses on educating more women in your community, you'll want to attract a larger audience. However, if you intend to concentrate only on your existing clientele, then plan for a smaller group.

You can make this a women-only event or expand it to include men who are widowers or part of a couple relationship. It's your choice.

Make a list of people you want to invite that may include:

- Current clients.
- Friends of current clients.
- Organizations that serve widows, especially if you have a connection with someone there:
  - – Widows' support groups
  - – Hospice organizations
  - – Congregations and ministerial associations
  - – Nonprofits, such as community foundations
  - – Grief consultants
  - – Adult living communities
  - – Senior centers
- Supportive adult family members of your widowed client or prospect. (Often a daughter will bring her recently widowed mother.)
- Couples contemplating the future when one spouse will be left on his or her own.

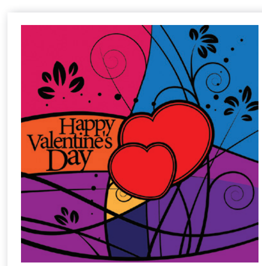
- Centers of influence—such as an estate-planning attorney or a CPA you recommend. A staff member from a community foundation or other nonprofit group may also be a good fit. Consider inviting them to cosponsor your event. By adding their mailing list, you'll also boost the potential attendance.

3 When and where is good?

Choose your date, time, and location.

- Select a date at least 4 to 6 months in advance, so you have plenty of time to plan and organize your event.
- If many of your potential attendees are winter snowbirds, select a date when most are in town.

- Avoid the mid-November to early January holiday season, often a difficult time for new widows.
- Retired women often like morning events. Some may not drive after dark.
- Best day of the week will depend on your group, but Tuesdays, Wednesdays, and Thursdays are generally more popular than Mondays or Fridays.



- Don't schedule your workshop between 2 and 3 p.m. This is a sleepy time for many.
- If you're inviting many career women, they often prefer a noon luncheon or after-work hours.
- The first half of February can be a great Valentine's Day focus—for women who "don't have partners to hug."
- If weather might cancel your event or reduce attendance—a snowstorm, for example—choose another date.
- Check your venue's available date(s) early. Have a backup alternative option.

- Don't schedule your program at the same time as another popular event, such as the local strawberry festival in your community. Also avoid these dates if possible:

  – End of August: up against end-of-summer activities with family
  – A major holiday week, such as July 4, Memorial Day, or Labor Day
  – Religious holidays

What's your content?

Create an overview with information about your event.

This can be the start of publicity pieces and invitations for your event. Include:

- Your program's focus. **If you develop your own program, planning the content will be up to you, including handouts and slide presentation. If you use an outside speaker, that's their responsibility.**
- Information about your speaker and topic.
- Date and time.
- Location.
- How to register.

See samples on the next three pages from actual events that sponsored Dr. Rehl.

Sample Program Flyers & Invitations

Moving Forward on Your Own

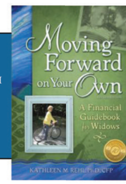
A Workshop for Widows, Wives & Friends

Come together with women who are widowed or anticipate becoming a widow in the future . . . or those who love and want to assist a widowed relative or friend

Presented from the Heart by

Kathleen M. Rehl, Ph.D., CFP®, CFT™

Inspirational Educator • Author • Speaker



Here's our focus:

- The shocking statistics!
- How grief sabotages a widow's thinking and decision making
- Three stages of widowhood and implications for your money
- Financial steps for recent widows
- Money pitfalls to avoid
- Issues of the heart as part of your future plans
- What to do before widowhood
- How to be supportive of widowed friends and relatives

Kathleen M. Rehl, Ph.D., CFP®, CFT™ shares insightful expertise and experience. She is a leading authority on widows and their financial issues. A widow herself, Kathleen is passionate about inspiring her "widowed sisters" in transition and their advisors.

She wrote the multi-award winning book, *Moving Forward on Your Own: A Financial Guidebook for Widows*. Her work has been featured in *The New York Times, Wall Street Journal, Kiplinger's*, and dozens of other publications. The U.S. Army also uses her guidebook in their Survivor Outreach Services centers worldwide.

After 17 years of providing personal financial advice, Kathleen sold her business at the end of 2013 to devote more time to teaching, speaking and writing. She's the owner of Rehl WEALTH Collaborations LLC. Kathleen is also on the faculty of Sudden Money Institute and serves as Dean of Women for the Purposeful Planning Institute.

Kathleen has walked the walk about which she speaks and writes . . . focusing on women who have loved and lost, inspiring these ladies to move forward on their own . . . yet not alone.

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For information about Kathleen's speaking schedule and more, go to www.KathleenRehl.com.


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ZACHARY KARABELL
Author, CNBC/MSNBC commentator, and writer for The Washington Post, Politico, and The Atlantic.
KATHLEEN M. REHL, PH.D., CFP®, CFT™
Author and contributing writer for The New York Times, Kiplinger's, and The Wall Street Journal.
ALSO FEATURING:
ERICA MCGINNIS
President and CEO, AIG Advisor Group
JERRY MURPHY
President and CEO, FSC Securities Corporation
LIBBY CHERRINGTON, CFP®
Managing Director, Cherrington Brotsky
Register now for this lunch and seminar.
Sponsored by Cherrington Brotsky
Westin Port Royal
February 24, 2015
Registration: 10:00 AM
Program: 10:30–2:30pm
Who should attend:
• Men and women who manage their family's finances and estate
• Anyone who must assume financial responsibility after losing their spouse
• Anyone who is looking for ways to achieve their life and financial goals—regardless of current age or wealth
What we'll cover:
• How the global economy impacts your wealth and financial options
• Preparing to make sound financial decisions in the wake of tragedy
Space is limited!
To register, contact Jeanie Fisher:
By phone at 843-757-2444 or email
jeanie.fisher@cbconsciouscapital.com
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DONATIONS REQUESTED TO BENEFIT:
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Inspirational Educator
Speaker
Author
Heart of Georgia Hospice
Location:
Date:
Time:
CarlylePlace
Rehl WEALTH COLLABORATIONS
Moving Forward on Your Own
Presentations from the Heart by
Kathleen M. Rehl, Ph.D., CFP®
Come Join Us
Thursday, October 30TH
12:00pm - 1:30pm
Lunch will be served.
Please RSVP by October 27TH • Call 478-405-4500
Location:
5300 Zebulon Road | Macon, GA 31210

Sample Program Flyers & Invitations *(continued)*

5 More ways to promote your event:

- At least two months beforehand, give clients and prospects "hold the date" information.
- A few weeks before your program, inform the local press. They'll often publish a news story about your activity. Click here for one example about a presentation at the Chautauqua Institution Women's Club. Here's another story.
- Contact "Talk of the Town" type radio shows that frequently welcome interesting people to interview about current local events. Here's a sample radio clip from station 1540 WADK in Newport, Rhode Island, for a financial planning firm's workshop there.
- Publicize your event on social media if appropriate. Here's one sample from a workshop in Miami.
- If there's a widows' support group in your community, let them know about your event.

6 Several days before your big day:

- Copy handouts for participants.
- Review supplies you're bringing for participants including pens or pencils to take notes.

- Test the audiovisual equipment to be sure PowerPoint slides project well and the sound system works.
- What goes on the welcome table? You'll probably want name tags and a registration sign-in page.
- If food will be part of the event, finalize any last-minute details.
- Consider giving attendees a small touchstone to help them remember your event.
- Plan to have someone there to greet folks before the event starts officially. At least one audience member may arrive a half hour or more early.

7 What's your follow-up plan?

How will you know if your workshop was a success? Your follow-up plan may help measure its effectiveness. You might create a questionnaire to give participants an opportunity to share their opinions on the program. It's also a way to let attendees request more information on this topic, if they are interested.

Continue to position yourself as an expert in working with widows … through your blog, newsletter, eBooklet you write, or future community events.

Event Checklist

❑ Identify the reason for your event: ______________________

❑ Set a budget: ______________________

❑ Select the date: ______________________

❑ Choose the location: ______________________

❑ Decide on your speaker—yourself or another (includes their agreement, travel arrangements, etc.): ______________________

❑ Create a program overview: ______________________

❑ If you will be the event speaker, develop your presentation, handouts and slides; if you use an outside speaker that's their responsibility: ______________________

❑ Consider cosponsoring or cohosting the event with a firm you regularly share clients with … or a community nonprofit (foundation, hospice, congregation): ______________________

❑ Identify people you'll invite: ______________________

❑ Connect with centers of influence (attorneys, CPAs, insurance professionals, etc.) who may tell their clients about your event: ______________________

❑ Plan refreshments: ______________________

❑ Draft a "save-the-date" notice or invitation: ______________________

❑ Design event invitation; plan how and when to mail/email: ______________________

❑ Decide how to handle the RSVPs: ______________________

❑ Contact local press with a media release: ______________________

❑ Contact local radio about potential interview: ______________________

❑ Publicize event in social media, if appropriate: ______________________

❑ Print handouts for your event: ______________________

❑ Check projection and sound equipment for the program: ______________________

❑ Organize what's needed for the registration table: ______________________

❑ Think through your follow-up activity: ______________________

❑ Other: ______________________

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After 17 years of providing personal financial advice, she sold her business at the end of 2013 to devote more time to teaching, speaking, and writing. Kathleen is the founder and owner of Rehl WEALTH Collaborations LLC. She is also on the faculty of Sudden Money Institute and serves as the Dean of Women for the Purposeful Planning Institute.

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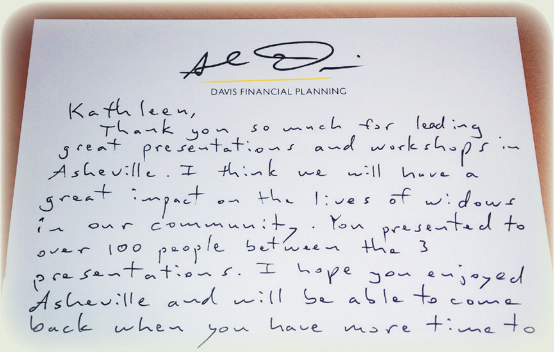
SUDDEN MONEY® INSTITUTE

For those desiring advanced credentialing, the Certified Financial Transitionist™ program is offered by Sudden Money Institute. A compact virtual training program focuses on those who specialize in working with widows.

Notes


DAVIS FINANCIAL PLANNING

Kathleen,

Thank you so much for leading great presentations and workshops in Asheville. I think we will have a great impact on the lives of widows in our community. You presented to over 100 people between the 3 presentations. I hope you enjoyed Asheville and will be able to come back when you have more time to

Note written by a financial advisor after a Moving Forward on Your Own event