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LIVE WORKSHOP:

Make Your **Events** an **Easy Yes**

Events: What Results Can you expect?

Over last 18-24 months:

- 1,000 people registered
- 40% attended
- 8-10% reached out

Results:

- Generated 9 new client households
- $11 Million AUM
- $12,000 ad spend

First webinar ONLY had 10 people on it!

Source: https://altruist.com/podcasts/the-unexpected-tool-that-led-to-millions-in-aum-with-isaac-presley/

PREDICTION:

AI is going to push us to value events and in-person experiences even more

Video made with Google’s new VEO 3

01

The Psychology Behind “YES, I want to go to that event!”

START by focusing on CURRENT Pain Points – the MORE specific the better

Email Example ➡️

Susan, are you planning a summer event but seeing low attendance rates?

I've heard from so many advisors that they're either getting the same faces at every event – or struggling to break single-digit RSVPs

That's why I'm hosting a LIVE workshop this week, **June 12 at 10 am PT/1 pm ET** to help you turn your event into an easy YES!

You'll walk away with a proven system that's helped advisors boost their event attendance. I'm breaking down the 3 event formats that are consistently generating new business – and giving you the exact communication plan to keep it hassle-free.

You'll get:

🧠 **The Psychology Behind "YES":** why certain event formats make prospects want to attend.

📧 **Done-For-You Marketing Materials:** the exact email invitations, landing page copy and follow up sequences that have proven to work – just for signing up!

💼 **LIVE LinkedIn Tutorial:** how to set up an event page and use advanced filtering to find, invite, and meet new prospects (completely FREE!).

🛠️ **FMG Events Tool Demo:** quick look at how our platform handles all the event logistics.

👉 **Join my workshop!**

Explicitly Explain The BENEFITS of Attending. What will they Get out of joining?

Susan, are you planning a summer event but seeing low attendance rates?

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👉 Join my workshop!

End with A Preview - A Video, Resource, Guide, Etc.

Same Email, just scrolled down to the end! ➡️

Here is a sneak peek of 4 event tips to make your event a success (and much more where that came from 😉):

Hope to see you there!

Samantha Russell
Chief Evangelist
fmg

A Great Advisor Example:

This event lead to 2 new client relationships!

This is image was added to the “events” section of the from the advisors’ website.

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02

Event Ideas That are an Easy “Yes”

GIVEAWAY:

Summer Events Toolkit

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Summer Events Toolkit

Summer is the perfect season to strengthen connections and create lasting impressions. This toolkit provides everything you need to execute three engaging events that will establish you as a trusted expert, connect with family members and deliver personal value to your clients (and prospects!).

Each toolkit is from our "Do It For Me" Program and includes:

- **Event Overview** - Complete event concept and execution guide
- **Planning Checklist** - Step-by-step timeline to keep you organized
- **Promotion Copy** - Ready-to-use marketing materials and messaging
- **Landing Page Copy** - Professional registration page content (PRO TIP: FMG's platform automates and collects RSVPs for you!)
- **Event Collateral + Talking Points** - Presentation materials and speaker notes

Event Toolkits

1. **Family Summer Event with Photographer**

   Create lasting memories while positioning yourself as the advisor who cares about what matters most - family.

   Perfect For: Building family engagement, creating laid-back experiences, generating social media buzz through beautiful photos.

   Download Family Summer Event Messaging Kit

2. **Collectibles & Heirlooms Appraisal Event**

   Help clients and prospects discover hidden value in their treasures while showcasing your expertise in protecting what's important.

   Perfect For: Attracting diverse age groups, providing educational value, creating conversation starters, building trust through expert partnerships.

   Download Heirlooms Appraisal Event Messaging Kit

Host Events That Bring In the WHOLE family

Cerulli Finds Just 19% of Investors Use Their Parents' Advisor

NOVEMBER 14, 2023 — BOSTON

An opportunity exists for advisors to focus on kindling intergenerational relationships

Just one in five affluent investors use the same advisor as their parents, according to the latest ***Cerulli Edge—U.S. Retail Investor Edition***. Advisors

FINANCIAL ADVISOR IQ

Most Americans Inheriting $100K+ Won't Stay with Their FA

Financial advisors who can address their clients' big picture, and not just their finances, stand to gain new clients, according to a new report from Equitable.

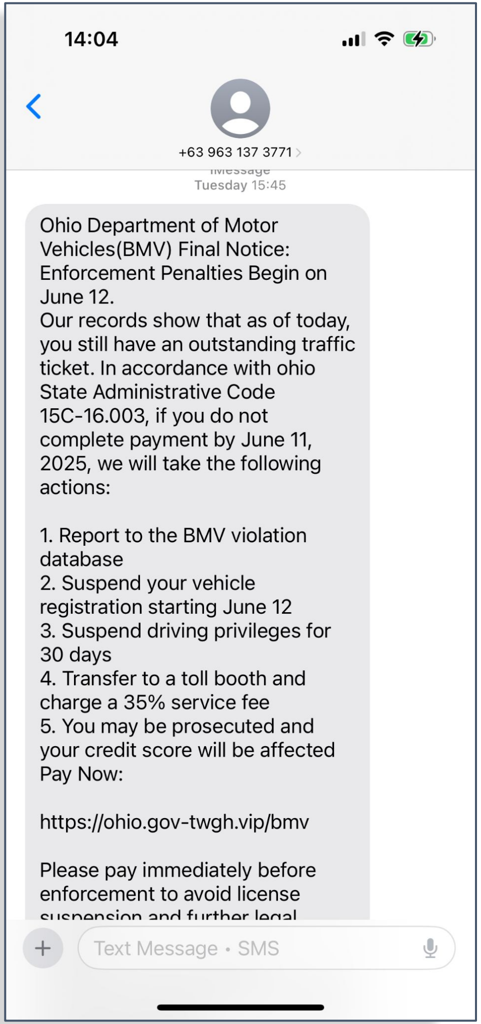
By Alex Padalka | October 10, 2024

The coming wealth transfer may leave some financial advisors wondering where all their clients went — while others may have a field of prospects ripe for the picking, according to a new report.

A recent **McKinsey** study estimates that more than $30 trillion will change hands by 2030 — and most of the recipients will be looking for a new advisor, **Equitable** said it found in a survey of 500 retail investors anticipating receiving an inheritance or primary benefit of more than $100,000.

Event Idea #1:

Current Scams and how to recognize them:



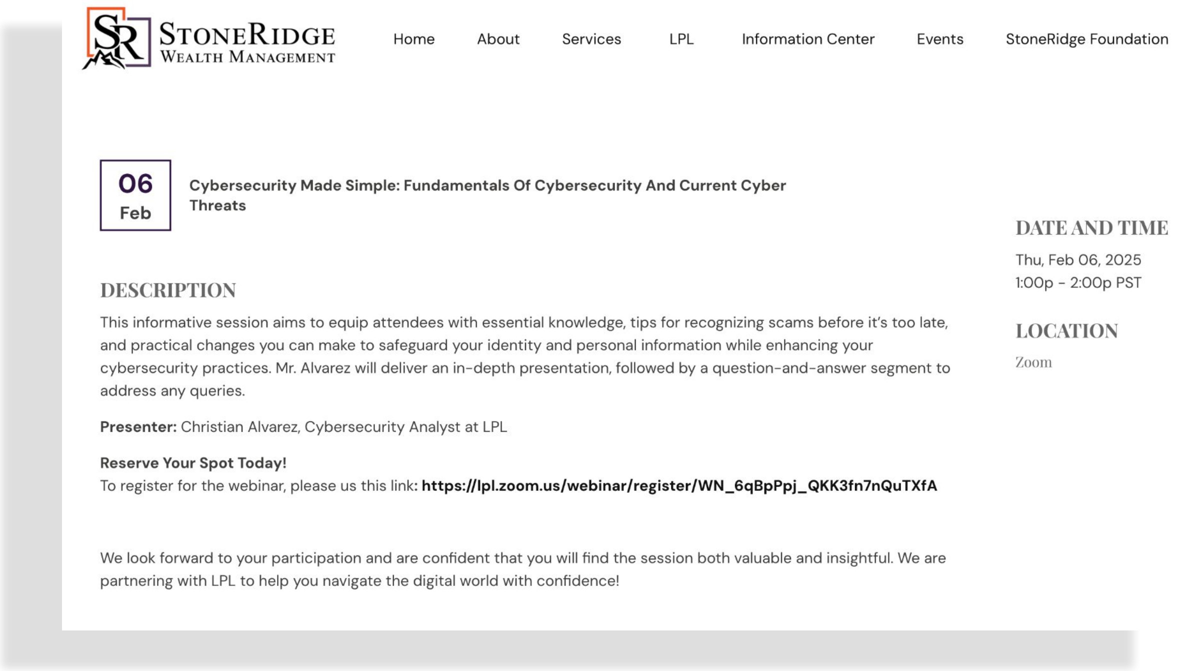
Current Scams Ideas:

Work with retirees and pre-retirees?
➡️Host a workshop on scams targeting seniors (and invite their kids!)

Can you reach out to a local FBI agent?
➡️Invite them to do a zoom call on the most popular financial and identity scams right now

Have systems you recommend to clients for how to best store sensitive documents and passwords?

➡️ Create a "How to Store and Share Your Information Guide" and deliver it as a presentation, giving each attendee a copy of the guide as a take-away



StoneRidge Wealth Management

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06
Feb

Cybersecurity Made Simple: Fundamentals Of Cybersecurity And Current Cyber Threats

DATE AND TIME

Thu, Feb 06, 2025
1:00p - 2:00p PST

LOCATION

Zoom

DESCRIPTION

This informative session aims to equip attendees with essential knowledge, tips for recognizing scams before it's too late, and practical changes you can make to safeguard your identity and personal information while enhancing your cybersecurity practices. Mr. Alvarez will deliver an in-depth presentation, followed by a question-and-answer segment to address any queries.

Presenter: Christian Alvarez, Cybersecurity Analyst at LPL

Reserve Your Spot Today!
To register for the webinar, please us this link: **https://lpl.zoom.us/webinar/register/WN_6qBpPpj_QKK3fn7nQuTXfA**

We look forward to your participation and are confident that you will find the session both valuable and insightful. We are partnering with LPL to help you navigate the digital world with confidence!

Source:
https://www.stoneridgewm.com/events/recap-recording-cybersecurity-made-simple-fundamentals-of-cybersecurit

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Event Idea #2:

Family Picture Day with a Professional Photographer

Maciej Kielbasinski, CIMA®, MBA · 2nd
Associate Financial Advisor at Thrivent
3yr ·

+ Follow

Christmas Family Photo Event is back!
We're kicking-off the season giving with a free photoshoot:
December 4, 2021 between 9am and 3pm at Thrivent's Vilicus Financial Associates in Bloomingdale. Details and signup sheet: https://lnkd.in/gREYibtc

31

4 comments

Family Picture Day Ideas

- Hire local photographer
- Choose Venue
- Send clients Sign Up Genius Form
- You pay photographer, they pay for photos they want
- Collect names/emails of ALL family members at event
- Have (stain free!) snacks and water on hand!

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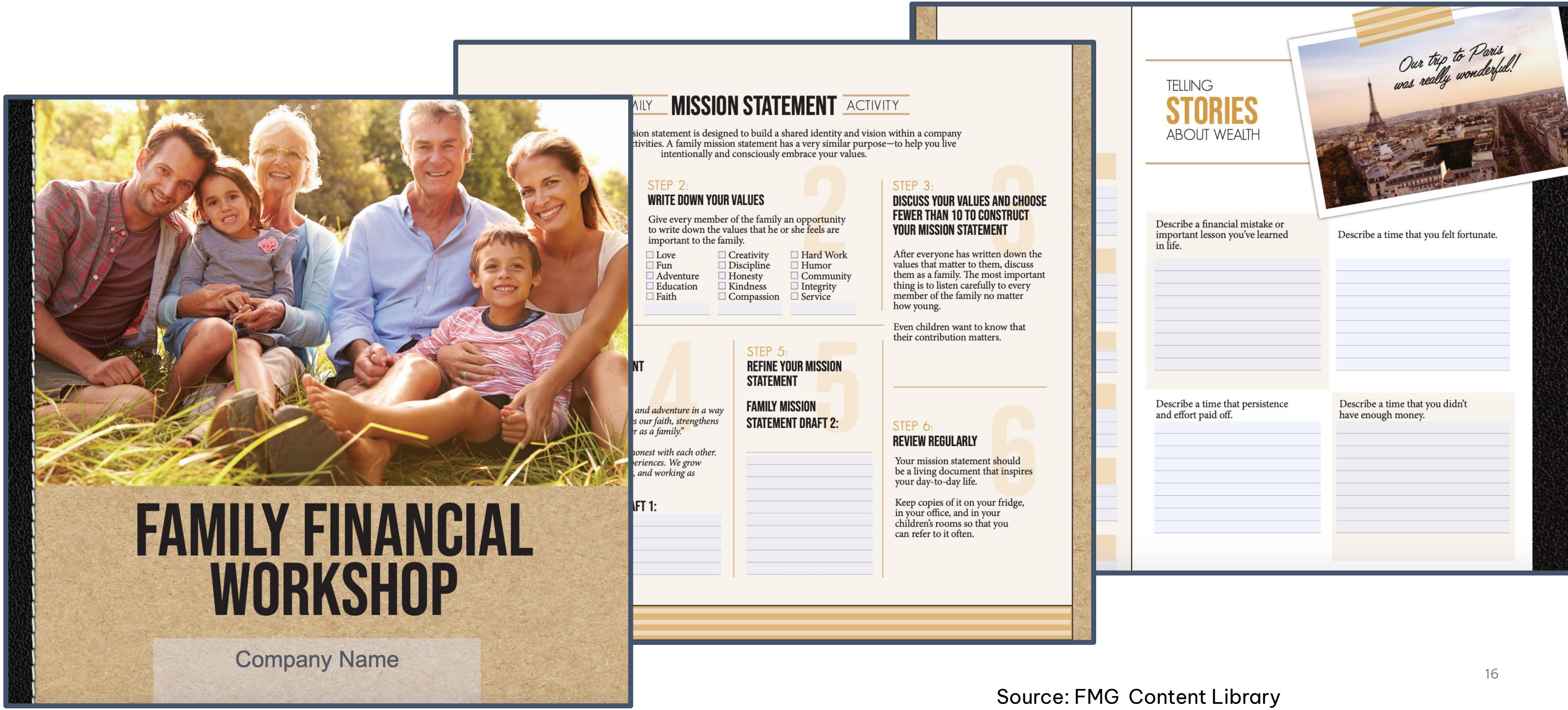
Family Wealth Conversations - Downloadable



Source: FMG Content Library

GIVEAWAY:

Everything you Need to Plan A Summer Family Event with a Photographer!

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Summer Events Toolkit

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fmgsuite.com

Host "A Focus on What Matters" Summer Event

A ready-to-use event idea to celebrate family and capture the moment.

🎉 Event Overview

What it is:

A relaxed summer evening designed to bring your clients, their families, and future generations together for a meaningful experience centered on connection and memory-making.

What's included:

✓ Professional family portraits

✓ A keepsake time capsule card activity

✓ Food, drinks, and casual summer fun

✓ Light legacy messaging—no financial content, just heart and intention

Theme: Celebrate the people and moments that make wealth worth planning for.

✅ Planning Checklist (Quick View)

6 Weeks Out:

☐ Hire photographer & consult on venue and lighting

☐ Book venue & set event capacity

☐ Design & order Time Capsule Cards + envelopes

☐ Confirm food & beverage

☐ Send out invitations

☐ Prep event signage and RSVP tracking system

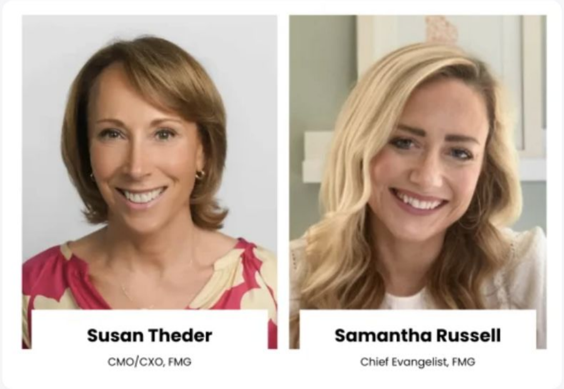
2 Weeks Out:

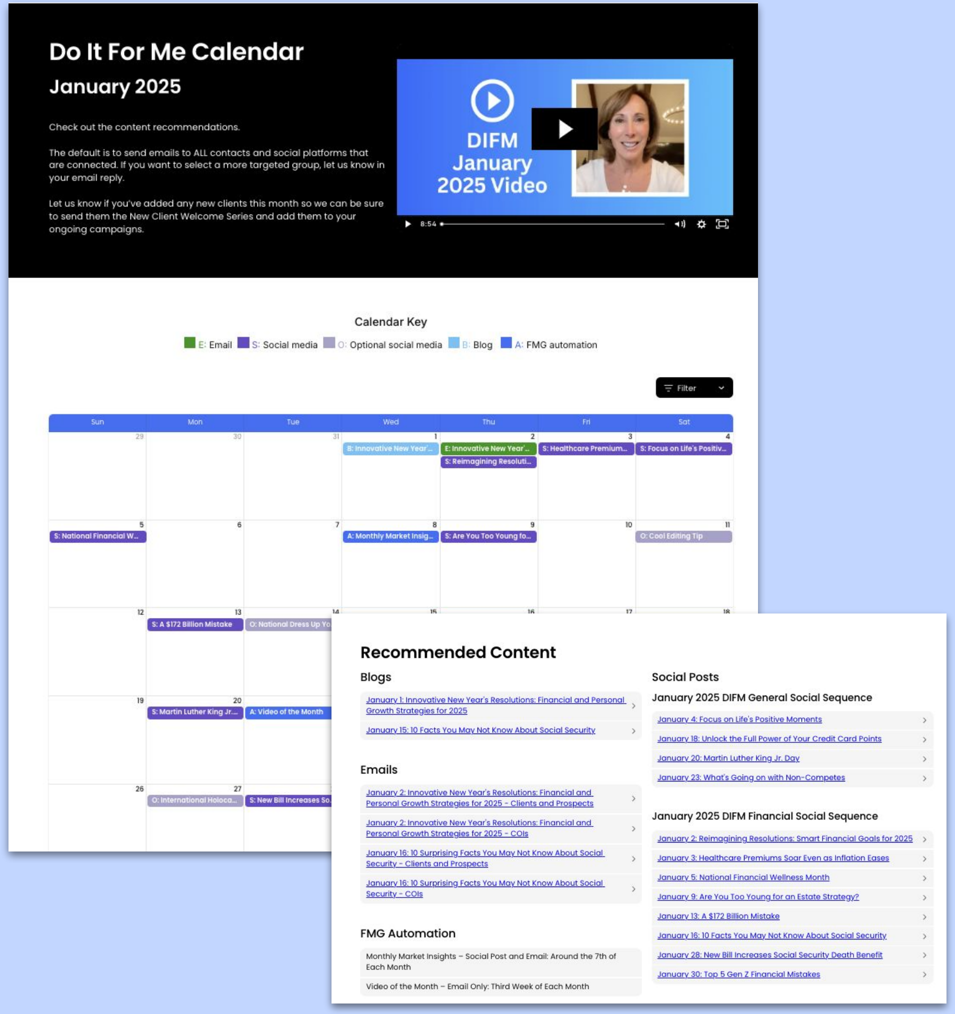
☐ Finalize guest list

☐ Print any branded items and signage, including a spreadsheet on which families can sign up for their time slot for their picture upon arrival

‘Do It For Me’ Marketing

- Monthly **content marketing** plan with customization tips
- Your own dedicated **Marketing Concierge**
- Increase **client** engagement, **drip on prospects and COIs**
- Take the **heavy lifting off** your plate
- **5-star content exclusively written** by Sam & Susan





Poll: Would You Like to learn more about how our team can support your events & marketing?

(either using the FMG tools or through our "Do It or Me" Program?)

Event Idea #3:

Antique Appraisal Event

CHESAPEAKE INVESTMENT PLANNING LLC

About | Our Services | Our Team | LPL | Resources | Events | Schedule a Call

13 May

Antique Appraisal Event

DESCRIPTION

Do you have an old family heirloom you've always wondered about? Join us for our Antique Appraisal event and find out what it's worth. Light appetizers and refreshments provided.

Space is limited so RSVP today!

madison@cipadvisor.com

443-249-3514 Ext 102

DATE AND TIME

Tue, May 13, 2025
6:00p - 9:00p EST

LOCATION

Dock House

110 Piney Narrows Rd
Chester , MD 21619

View on Map

BrokerCheck by FINRA

03

How to Use FMG’s Event Tool

04

Promotion - Let’s Get the Most People There!

Create a Registration Page People Want to Sign up!

Ellenbecker Investment Group

About | Services | The Voice of EIG® | Blog | Resources | Events | Contact

Join us virtually for clarity on Social Security topics that can often seem overwhelming. Learn how your benefit is determined, tips on when to start receiving benefits, how Medicare is connected, plus details on spousal benefits and survivor benefits.

Even if you attended a previous presentation, join us again as regulations change year to year. This webinar is open to the public - share with your spouse, family or a neighbor who is planning for this stage of life.

Live Webinar: Register for this live virtual session. Due to government restrictions, we are not able to record the session. Slides will be available for registrants after the webinar.

Before you attend...
During the presentation you will learn how to use "my Social Security" online account and other online services. In advance of the webinar, go to www.socialsecurity.gov/myaccount to create a my Social Security account and have your Social Security Statement (if applicable).

Resources | Events | Contact

REGISTER

DATE AND TIME

Thu, Jan 30, 2025
1:00p - 3:00p CST

LOCATION

Webinar: Microsoft Teams

NOTE

Webinar only, presented via Microsoft Teams.

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Email Promotion Specifics

Send THREE emails for optimal performance.

- 1 week before
- 1 day before
- 1 hour before

Number of Email Reminders	Average Registrants	Percentage increase over 1 email reminder
1 email reminder only	256	-
2 email reminders	474	+85%
3 email reminders	807	+215%
4 email reminders	798	+212%

Source: https://danielwaas.com/how-to-increase-webinar-attendance-rates/

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How do you get more clients to refer friends and family?

Marketing Tip:

- To get your clients to bring friends and family to your in person events --- Do this: One week after sending out the initial invitation, resend the invite, but this time, add a few sentences: "Wow, we're thrilled by the excitement for the upcoming 'xxxx' event— we can't wait to see so many of you. Several attendees have reached out asking if you can bring a guest or two. We are limited on space, but would love to host your friends or family. Please RSVP as soon as possible and we'll try to accommodate as many as we can."

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Source:FMG "Do It For Me" Marketing Program

Promotion: What if I don't have a big email list?

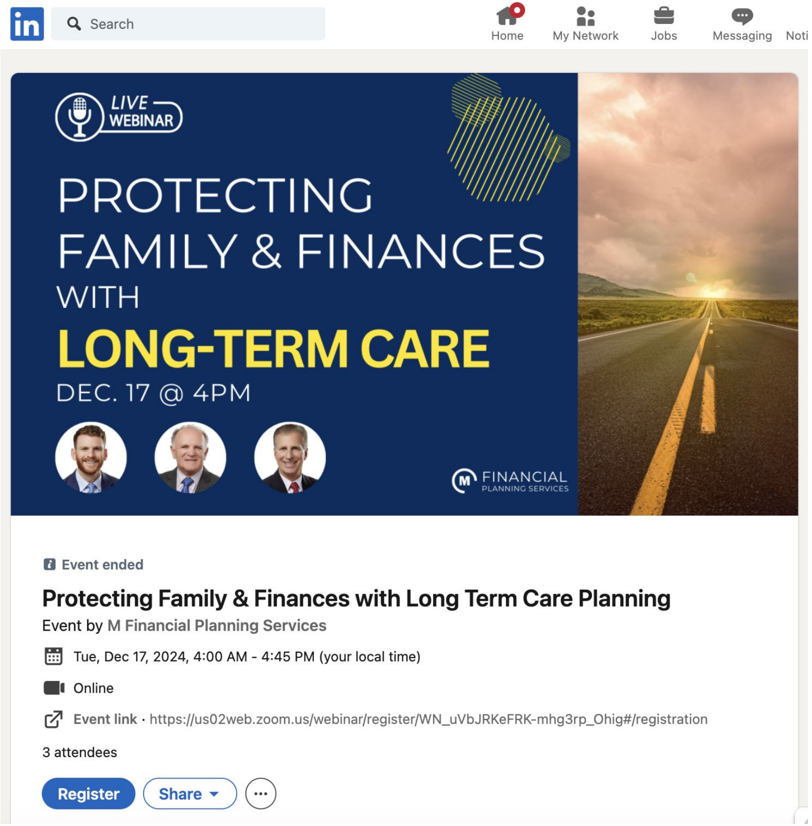
Partner with COI or SME

- Have as a guest and Ask them to promote to their audience too
- Or just share with COIs whose audience could benefit

Social Media

- Posts that focus on the BENEFIT someone gets from joining
- Direct invites via Linkedin - target your audience
- Setup Linkedin Event page →

Use LINKEDIN -



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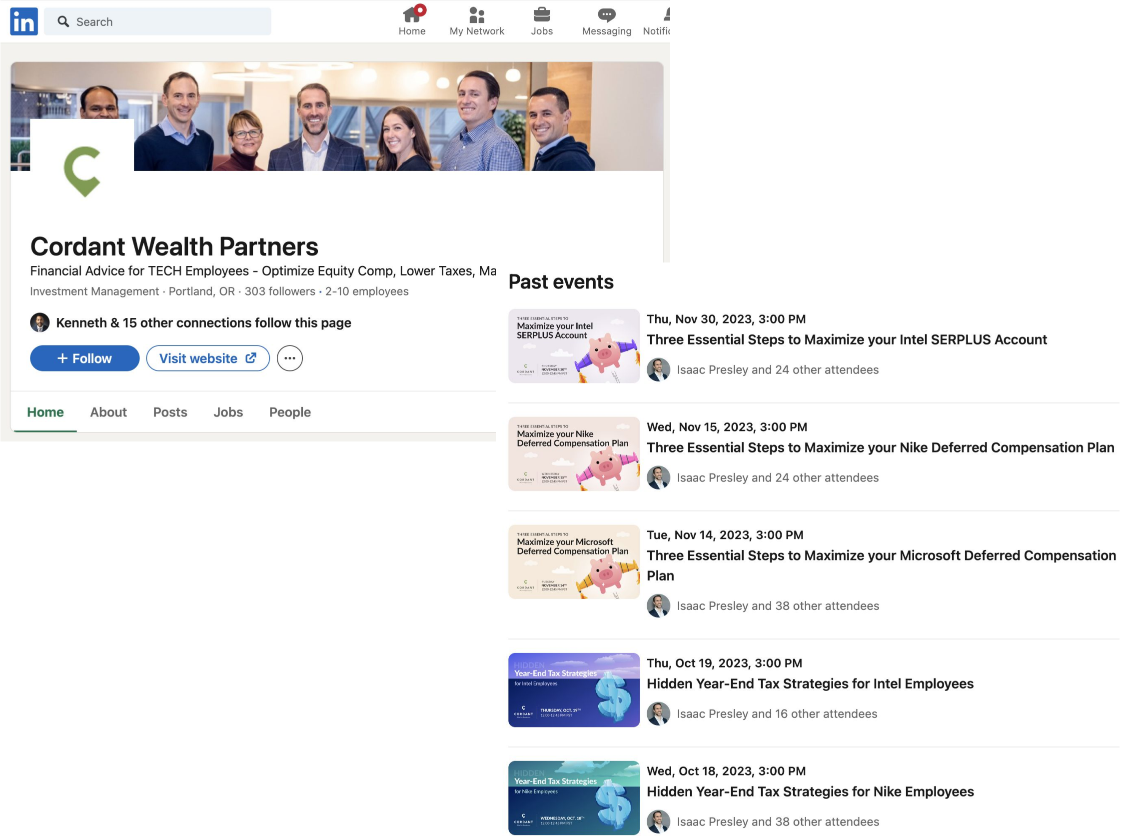
Create a LinkedIn Event To Promote Webinar

- Create a LinkedIn event page for your event
- You can invite people directly FROM linkedin (even without their emails!)
- Connected to 500 Nike employees? Filter and invite them all
- You can still use ZOOM to host if not in-person



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Social Media Promotion Specifics

- Don’t start your post by promoting your event
- Start by talking about a problem your audience has
- Then offer some quick wins (that they get just by reading the post)
- THEN say “we are going to do X event to teach more about this”

Samantha Russell • You
Chief Evangelist at FMG Suite | Keynote Speaker | Marketing + Fi...
1w • Edited •

I used to host events and never get real leads from them.. until I started doing these 4 things.

1️⃣ Use the "WIIFM" approach to write the invitation/email/landing page
- Clearly articulate what the person attending the event will get out of it
- If it's a fun event - make it sound fun! include great photos!
- If its educational, be crystal clear why they need to learn what you'll share

2️⃣ Have a way to collect names + email for EVERY SINGLE PERSON

💡 TIP: If your event is a LinkedIn Live, Youtube Livestream, a Podcast:
....You can collect leads easily with Textiful (my favorite tool)
- Just say "Text this number and we'll send X to you"
- (Just be sure what you're sending is amazing and people will want it!)

3️⃣ If you want people to ACTUALLY spread the word and invite their friends or family:
- Follow the exact email template I lay out in the video (at the 1:20 mark)

4️⃣ Skip the hard sell, follow up with even more valuable education:
- Don't host a great event, but then only do a hard sell afterwards 🙄
- Nobody wants to come to your event and then get 15 emails after of you asking them if they are ready "meet about their finances"

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Social Media Promotion Specifics

- Say "comment ____" and I'll send you the link to join us!
- This builds momentum and gets people commenting on the post - which then alerts the algorithm to show it to even more people
- Direct Message and ask for comments/shares
- If you are partnering with a COI or SME - make sure you tag them! Tag the venue too if applicable!

Next week on Thursday, we at FMG are hosting a live event where I'll teach you:

1. The top event ideas for 2025
2. How to attract high quality leads to your event
3. The best way to follow up with leads after the event

🔴 If you want to join us, comment "EVENTS" and I'lll send you the link to sign up!

BONUS: Everyone who joins signs up will receive an event success checklist with our key takeaways compiled for easy reference all year long!

you've ever held? I'm looking for an advisor to join me and talk about it so please share!

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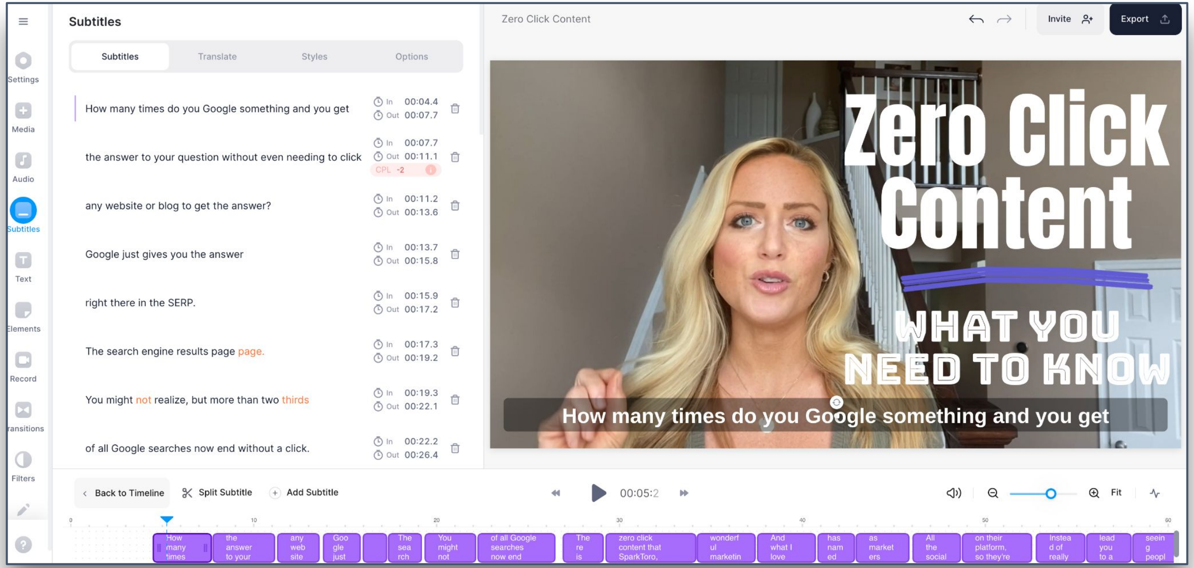
05

Post-Event Steps to Get the Most Bang For Your Buck

Step #1: Edit & Transcribe Video (if Webinar)

- Add subtitles
- Create Short Clips for Promotion (30 sec to 2 mins)
- Transcribe (you'll use this in your blog post)



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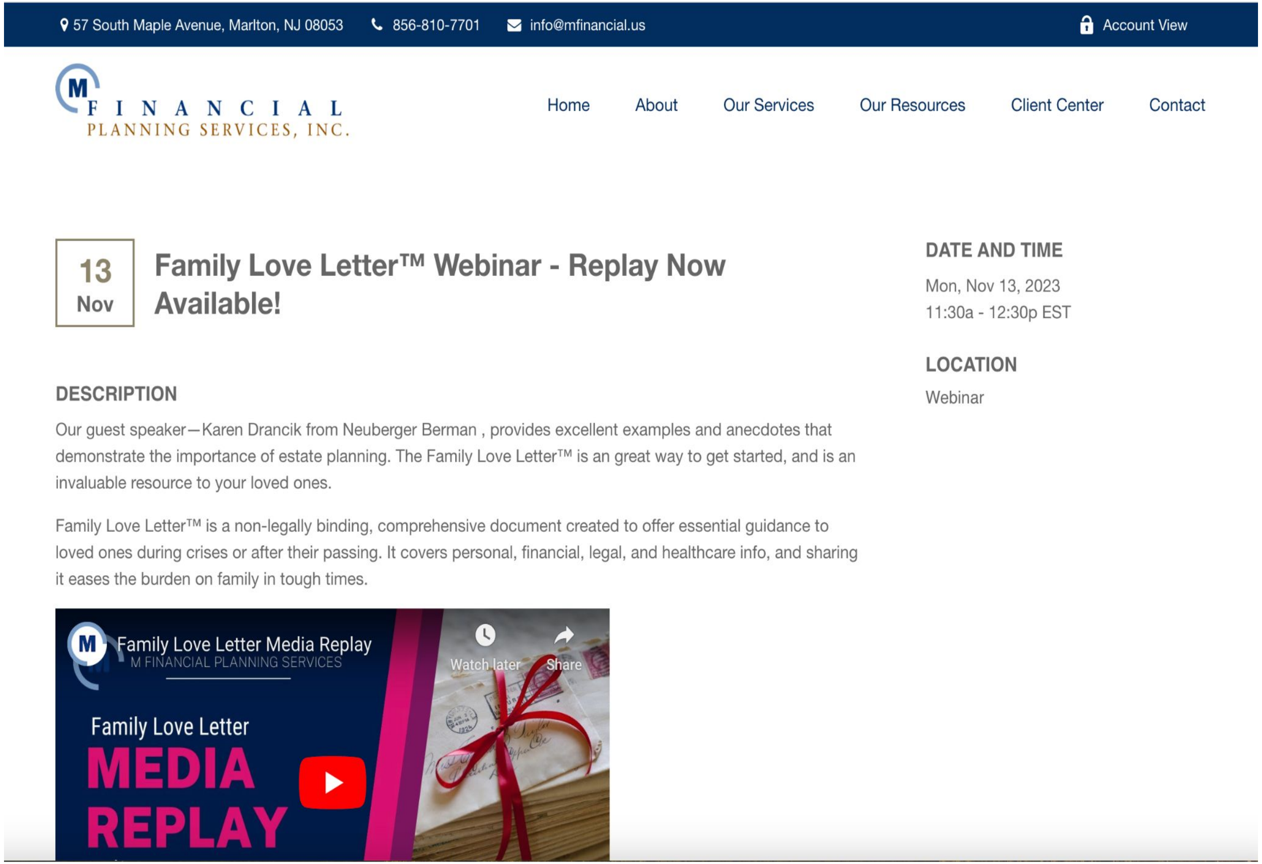
Step #2 - Add Recap of Event to Your Website

1. Link Resources

2. Upload video or photos

3. Add Link to Calendar



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Step #2 - Email all those who registered

- Divide into WHO attended and who DID NOT attended
- Different messaging for each
- Include Call-To-Action to schedule a meeting
- Have COI partners email too

On Mon, May 1, 2023 at 1:33 PM Samantha Russell <srussell@fmgsuite.com> wrote:

Hi Tracy,

Thanks for joining us on our social media webinar last week! It was a ton of fun, and I hope you stepped away feeling re-energized and motivated to connect and engage on social media.

As promised, here is a link to the replay and slides.

Social media can feel a bit like a maze, which is why Stacy's quote really stood out to me: *"It's a dialogue, not a monologue, and some people don't understand that. Social media is more like a telephone than a television."* Wise words indeed! 💬

Our team is always here to help, whether you want to learn more about our "Do It For Me" program or simply want to chat about your social media strategy. Just click here to book some time with us.

Remember, social media is all about engagement, so don't hesitate to reach out if you have any questions. I look forward to staying connected on social media! 😊

Have a great week!

Samantha Russell
Chief Evangelist, FMG

P.S. My next webinar is on May 10 with my friends at Holistiplan. We'll be covering the question – "My clients received their tax return. Now what?" and sharing specific strategies on how to engage with clients after tax day. Click here to save your spot.

Step #5 – Repurpose Content to keep promoting

- Include the replay link/event recap photos in email newsletter
- Post great clips to social -say “Want the full workshop? Comment “Workshop” to get it! (then DM it)
- Turn it into a podcast episode

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Ready to Start Generating Leads with Events & Webinars?

- Collect registrants, email invites and automate follow up emails
- Pre-Made Webinar Slides, Scripts & Landing pages
- Direct Integrations with for easy compliance
- New Do It For Me Program

Contact Us: Marketing@fmgsuite.com

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Want to learn more?

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com