



Financial Seminar Planning Tool Kit

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A Guide to Preparing, Planning and Executing Your Financial Seminar

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Seminar Preparation Checklist

- Find and Reserve Your Restaurant** – See “Restaurant Locator Tips” on next page to help find the right place.

The ideal restaurant will meet the following key criteria:

- Restaurant should be within a 15-20 min drive of seminar invitees
- Private Function room
- Comfortable seating for 30-50 people (Tables of 4, 6 or 8 – not classroom)
- Good parking
- Simple dinner \$20-25 per person, including tax and gratuity is the average
- Schedule dinners for 6:30pm (or 4:30pm for Retiree Market)

- Choose Your Seminar Topic** – Note: Response Mail can fax you samples of previously used invitations that you can revise to reflect your seminar. Topics include but not limited to:

- Retirement Planning
- Reverse Mortgage
- Hearing Aids
- Estate Planning
- Premium Financing
- Lasik
- Long Term Care
- Medicare Advantage
- Plastic Surgery
- Investing

- Identify Your Market** – You will be able to target your mailings by selecting the following criteria:

- Zip Code (see zip code search tips on next page)
- Household Income
- Age
- Other options available (Speak with your rep)

- Decide how you want to receive RSVP's to your seminar** – Invitee's will have two (2) ways to reserve space at your dinner seminars: Phone and Mail

1. Phone

- **800 RSVP Service SeminarRSVP.com (RMERSVP.com):** This is the preferred method. RME has a web-based 800 RSVP service. We will give you a personal 800 number, that will be answered by a “live person” 24/7 and you will be able to see who has responded anytime online.
- **Your Company Phone:** Use this option **ONLY** if you have dedicated staff to handle the influx of RSVP's and a voice mail system that has sufficient memory to handle potentially 50-100 voicemails.

2. Mail

- **Business Reply Card:** This is a permit you get from the United States Postal Service, which allows the invitee's to simply fill out the card and drop it in the mail, and the USPS will charge you for the postage. Visit your local post office for more info.
- **Courtesy Reply Card:** This requires the addressees to affix their own postage stamp on the card. If you are using the RSVP service, Courtesy Reply is sufficient.

- Fill out and return all three (3) RME order forms** – We cannot begin your order until we receive your order forms:

Paperwork and orders are due based on time zones.

- EST - 35 days
- MST - 37 days
- CST - 36 days
- PST - 38 days

QUESTIONS? CALL 1-800-795-2773
JERRY LANIER X5346

Restaurant Locator Tips

RME has the most extensive database of event locations. Give your consultant a list of zip codes where you want to conduct seminars and he/she will forward you a list of locations where seminars have been held in the past.

How to find a Restaurant:

- www.google.com
- www.zagat.com
- www.opentable.com
- www.switchboard.com - Business Name or Category = Banquet Rooms
- www.superpages.com - Business Name or Category = Banquet Rooms

IMPORTANT NOTE: Only focus on restaurants! Eliminate wedding halls, pure banquet facilities, hotels and country clubs.

Local Restaurants:

It is very common for local Italian and Steak restaurants to have private function rooms. They are usually very popular for hosting pre-wedding dinners, private dinner parties or other small functions.

National Chain Restaurants:

Contact your local Red Lobster, Olive Garden, Outback, Magganios, etc. restaurants. Many have function rooms apart from the main dining room.

Negotiating with the Restaurant:

When dealing with the restaurant management, keep the following in mind: Each invitation will have their logo on it – that's 6,000+ pieces of free advertising! You are booking THREE or FOUR dinner seminars and if they make a good proposal, you'll hold all your seminars there! If they ask for a deposit or for you to guarantee a minimum number of dinners, here's the formula: Take the number of seats in the room, multiply by the number of seminars, divide by 2, take that number and again divide by 2, then multiply that number by the cost per plate! (Example: 30 seats X 4 seminars = 120, divided by 2 = 60 divided by 2 = 30 X \$20.00 per person = \$600). Remember, you can ALWAYS increase the number of dinners as your seminar dates fill up.

How to find Maps of Zip Code areas:

- Zip Code boundary map: www.usnaviguide.com/zip.htm
- Zip Code mapping - plotting multiple points: www.batchgeocode.com
- Multiple mapping tools: <http://zip.langenberg.com>

How to find all the zip codes for a particular city (zip codes only, no map)

- Zip Code listing by State & City: www.mongabay.com/igapo/zip_codes/index.htm
- Zip Code by mile radius: www.allplaces.us/dfz.cgi
- <http://maps.huge.info/zip.htm>
- <http://quickfacts.census.gov/qfd/index.html>
- <http://www.factfinder.census.gov>
- <http://www.census.gov/cgi-bin/gazetteer>

How To Complete Your Seminar Order Forms:

To ensure accurate and timely processing of your seminar materials, it's vital that you supply all the information on the three (3) RME Seminar order forms. This guide was designed to address common questions that arise when filling out these forms. Please print legibly.

ORDER FORM 1 – Mailing Information

RME Order Form 1 – Mailing Information
IMPORTANT: Forms must be completed and mailed or e-mailed to RME a minimum of 30 days prior to your first event date. 45 days for West Coast.

CONTACT INFORMATION
 Company: _____ Primary Contact: _____
 Address: _____ City: _____ State: _____ Zip: _____
 Phone: _____ Fax: _____ Cell: _____

YOUR MARKETING PACKAGE (Please select one)
 Same as previous order
 Same as previous order, but new invitation package
 Invitation Code: _____
 Envelope Color: _____
 Envelope Size: _____
 Envelope Style: _____
 Quantity: _____
 Premiums: _____

REPLY CARD INFORMATION
 Business Reply Card
 Courtesy Reply Card
 Same as Above Address

RETURN ADDRESS
 Same as above, if not please fill out below
 Address: _____ City: _____ State: _____ Zip: _____

CONTACT
 Standard (standard postage includes 7" size postage)
 Enhanced Color (Live Stamp - Additional cost)
 1st Class Mail (Additional cost with extra postage)

Questions? Call Your Marketing Representative at 1-800-795-2773

INTERNAL USE ONLY
 Date: _____
 Sent: _____
 By: _____
 Title: _____

This section must be filled in completely. This is used to create/update your file in our database.

If you are using the same package as your last mailing with us, please check the appropriate boxes.

Please indicate the style of invitation you would like to use in your mailing and additional inserts or premiums.

Please choose either Business Reply Card or Courtesy Reply card. You must have a valid USPS Business Reply permit in order to choose the Business Reply Card option. (See the Seminar Preparation Checklist section)

Whether you are using a Business Reply or Courtesy Reply card, please fill out this section completely. This is the section where the reply cards will be sent.

ORDER FORM 2 – Event Information

RME Order Form 2 – Event Information
IMPORTANT: Forms must be completed and mailed or e-mailed to RME a minimum of 30 days prior to your first event date. 45 days for West Coast.

Event 1
 Date: _____ Start Time: _____ Restaurant: _____
 Address: _____ City: _____ State: _____ Zip: _____
 Restaurant Website: _____ Use Logo:

Event 2
 Date: _____ Start Time: _____ Restaurant: _____
 Address: _____ City: _____ State: _____ Zip: _____
 Restaurant Website: _____ Use Logo:

Event 3
 Date: _____ Start Time: _____ Restaurant: _____
 Address: _____ City: _____ State: _____ Zip: _____
 Restaurant Website: _____ Use Logo:

Event 4
 Date: _____ Start Time: _____ Restaurant: _____
 Address: _____ City: _____ State: _____ Zip: _____
 Restaurant Website: _____ Use Logo:

RESERVATION SERVICE
 I need an Event Reservation Service
 I need a Reminder Card Service
 I need a Seminar RSVP Service

Questions? Call Your Marketing Representative at 1-800-795-2773

Clearly print the Date, Location, Address, City, and State and start time of each seminar. Also indicate if this is a lunch or dinner seminar. (Note: if you are using the same restaurant for all seminars, you only need to provide this information in the first box)

If you want to use the restaurant's logo, please provide us with either: clear copy via USPS or electronically in a .jpg or .tif format. Fax copies of logos cannot be used.

If you are using RME's Seminar RSVP Service, fill out this section completely.

ORDER FORM 3 – Mailing List Research Information

RME Order Form 3 – Mailing List Research
IMPORTANT: Forms must be completed and mailed or e-mailed to RME a minimum of 30 days prior to your first event date. 45 days for West Coast.

LIST RESEARCH CRITERIA
 Age: _____ to _____ Household Income: \$ _____ to \$ _____
 1st Class Mail 2nd Class Mail 3rd Class Mail

SPECIAL FILTERS (May incur additional cost)
 Homeowner Not Within 5
 Live In Value \$ _____ Income Production Month \$ _____
 Home Value \$ _____ Home In Occupancy Status _____

ZIP (We recommend doing an initial radius search for your first list research report)
 Radius Search: _____ miles (min. 1 zip code) 25 Miles 50 Miles 75 Miles 100 Miles
 Zip Search: _____ (provide zip codes for your mailing area)

Desired mailing quantity (Required): _____ (rounding will occur since there is no decimal)

ADDITIONAL SERVICES
 Additions Invoices Onsite Request
 Personal Seminar Responses Corporate Solicitations

DISCLAIMER NOTICES
 By placing this order, you acknowledge and agree that RME, LLC does not guarantee response rates, results, or delivery by the USPS to deliver the mailing. RME, LLC is not responsible for any delays or non-delivery of mail due to postal service issues. RME, LLC is not responsible for any delays or non-delivery of mail due to postal service issues. RME, LLC is not responsible for any delays or non-delivery of mail due to postal service issues.

Questions? Call Your Marketing Representative at 1-800-795-2773

Customer Signature: _____ Date: _____

If you have not already finalized your mailing list with your Sales Representative, please fill this form out completely.

Please provide your contact information here. Include your phone and fax numbers clearly.

Indicate the Age, Household Income and other options.

For faster results, you may choose to select only ONE zip code and choose RADIUS COUNT. Simply provide one zip code and indicate the number of miles outside of that zip code you wish to search.

If you are not using Radius Count, fill in at least 5 zip codes.

Congratulations!

Now that you have completed your RME order forms, email or fax them along with your invitation copy.

Best Practices for Successful Seminar Marketing

- **Response Mail Express** has marketed more than 150,000 consumer financial seminars as of January 1, 2008. Advisors that follow RME's social dinner concept typically experience 75-150 reservations from a 6,000 – 10,000 -piece mailing if the following guidelines are followed:
- **Venue:** Local restaurants equivalent to Outback Steakhouse that have a function room or national chains like Outback Steakhouse, Red Lobster, Olive Garden that have a function room. Country Clubs historically do not work.
- **NOT RECOMMENDED** – Hotels, Ethnic Restaurants, Libraries, Banquet Centers, Private Clubs, Buffets, Your office, museums, art galleries
- **Best Days:** Tuesdays and Thursdays, followed by Wednesdays.
- **Number of Events on Mailer:** You should advertise 3-4 seminars in one 6,000-10,000 piece mailing. Other days are not recommended
- **Dinners vs. Lunches:** Dinners have out-pulled lunches 2 to 1. Breakfasts, appetizers, high teas, refreshments, snacks only are not recommended.
- **Ages to prospect:** Pre-Retirees – Age 50 at an absolute minimum, but 55+ has drawn better
Retirees – Ages 60-79
- **Income:** Pre-Retirees - \$50K+ or \$75K +
Retirees – \$30K - \$70K
- **Starting Times:** Pre-Retirees – Three dates at 6:30pm or Two dates at 6:30pm and one at 4:30pm
Retirees – Three dates at 4:30pm or Two dates at 4:30pm and one at 6:30pm
- **Reservations:** Use www.rmervp.com. **DO NOT take the calls yourself!**
- You must provide a meal. Very few people show up just for the meals. In 150,000+ mailings, dinners have achieved a much greater response than lunches. Breakfasts, refreshments, coffee and dessert, wine and cheese, hors d'oeuvres or brunch almost always generate a disappointing response.
- Confirm all reservations at least once, no later than 2 days before each seminar. RSVP call ins are diminished when using phone recorders to take in-bound calls. Live answer is suggested at all times.
- Follow up the next day after each seminar with the attendees who didn't request an appointment to find out if they're interested in meeting with you.
- Mail is delivered mostly via Standard Mail. It typically takes 7 to 12 days to travel in the mail. We cannot control the USPS schedules. RME is NOT responsible for early or late arrivals, or mis-deliveries by the USPS. All invitations are scheduled to be in the homes approximately 10 to 12 days before the first seminar date.
- Please note that all households within your zip codes will not necessarily receive the invitations. Even though some homes or individuals may fall in your selected criteria they may not receive the mail due to the list company not being able to verify their actual demographics. This is very normal with all mailing lists nationally.
- List information is gathered from various sources and the information is inferred. You should expect a deliverability rate of 95-98%. (national standard). Asking consumers about their income level or judging by their appearance does not qualify or disqualify that lead. Confidential information like that can only be verified with documentation at appointments. Know your area and the zips where your target prospects live.
- Typically your response will last several days since Standard mail is delivered in stages (not all at once).
- Attend Seminar Success University (speak with your consultant) or visit www.seminarsuccessuniversity.com.