

LifePlan Meeting Checklist

Name	Yuee
Date:	Sept 4 / 2018

<u>New Business/ Investments Desk</u>	
Insurance	Meeting type (circle one) Insurance/ Seg Funds/ Mutual Funds
	CE's? No/ Yes #: <u>1</u>
	Food provided - <u>Yes</u> / No
	Yes - We pick up / <u>Presenter picks up</u>
	What time does the presenter want the food: <u> </u>
	Any special requests as to the type of food? <u> </u>
	Invitation/ check list sent to Reception
<u>Reception Desk</u>	
	Invitation sent to advisors
	Invitation/ calling list/ check list printed and put into folder
	Add meeting to the LifePlan website
	Add meeting to the LifePlan newsletter
	Email admin staff with meeting request via Outlook
<u>1 Week Before the Meeting:</u>	
	Email advisors with meeting request via Outlook
<u>3 Days Before the Meeting:</u>	
	Call advisors on the list to confirm attendance
<u>1 Day Before the Meeting:</u>	
	Order food or ask Ariane/ Yuee to pick up
	Contact Thea/ Brandi with the attendance numbers
	Print out sign in sheet (keep in folder until meeting)

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Please email me the # of
Attendee on Friday Sept 7/18
& let Son from SSA know.

tx - yuee
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