



Quick Client Event Sheet

1. Objectives – What do you hope to accomplish with this campaign?

2. Marketing List – List prospects, client couples, and COIs to invite.

Total Count:

3. Event – Establish event parameters.

Theme:

Venue & Wow Factor:

Topic & Presentation Outline (if applicable):

Strategic Partners (wholesales, complementary businesses, charities:

Event Planner (if applicable):

Caterer (if applicable):

Entertainment/Guest Speaker:

Photographer:

Media Contacts (if applicable):

Invitations:

Insurance:

Compliance:

Event Supplies & Equipment:

Prizes & Gifts:
