



## Event Planning Questionnaire

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

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

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Total Count: 

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**3. Event** – Establish event parameters.

Theme: 

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Venue & Wow Factor: 

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Topic & Presentation Outline (if applicable): 

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Strategic Partners (wholesales, complementary businesses, charities: 

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Event Planner (if applicable): 

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Caterer (if applicable): 

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Entertainment/Guest Speaker: 

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Photographer: 

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Media Contacts (if applicable): 

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Invitations: 

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Insurance: 

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Compliance: 

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Event Supplies & Equipment: 

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Prizes & Gifts: 

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