



## 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: \_\_\_\_\_

**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: \_\_\_\_\_