

Seminar Marketing 2021



Fill Your Sales Pipeline with Qualified Prospects Using Broadridge Seminars

Whether you are hosting in-person or virtual events, the goal is always the same: to educate about the need to prepare for a financially secure future. Each title in our robust library of educational seminars is FINRA reviewed and designed to make a powerful impression, no matter the format or location.

Multi-Day Workshops

Duration: Approximately 4 to 10 hours

Benefits:

- Provide attendees with a broad, lasting financial education
- Highest prospect-to-client conversion ratios
- Largest income opportunity

Single-Session Seminars

Duration: Approximately 1 hour

Benefits:

- Establish yourself as a credible authority on specific topics
- Tailor seminars to your target audience
- Utilize for prospecting or client appreciation events

Webinars & Presentations

Duration: Approximately 30 minutes

Benefits:

- Provide information in a quick, digestible format
- Ideal for lead-generating webinars and one-on-one client meetings
- Each presentation includes a digital invite video

Plus, Fill Every Seat with Our Event Marketing Solutions

Virtual Event Marketing

Gain brand awareness and attract webinar registrants with a powerful digital marketing campaign

- Attract the right prospects — we manage a geo-targeted digital advertising campaign to attract webinar attendees
- Easy to launch — our turnkey campaigns include an optimized landing page and digital ads that are ready to deploy for your upcoming event
- Build your lead pipeline — receive emails with webinar registrant information for easy post-event lead nurturing

Concierge Event Marketing

With our all-inclusive, no-risk event planning service, seminar marketing is easier than ever

- Hassle-free seminar experience — you choose the topic and date, and we handle all the logistics and details, including digital marketing campaigns
- No upfront marketing costs — you pay based on event attendance results
- Seminar savings — you can receive added seminar discounts when purchasing Concierge Event Marketing services

Direct-Mail Invitations

Introduce yourself with professional invitations that are as impressive as the seminar you are presenting

- Targeted mailing lists — we provide a list of local prospects who meet your demographic criteria
- Customized for your brand — invitations include your photo, bio, and contact information
- Multiple format options — including 8-page brochures for Multi-Day Workshops and premium wedding-style invitations for Single-Session Seminars



Seminar Marketing Dos and Don'ts

The best presenters have seminars (and webinars) down to a science. Take advantage of their collective knowledge to avoid common mistakes and give your events the best possible chance of success.

Do

DO choose a start time that appeals to your audience.

For in-person events, the best start time for working prospects is between 6:30 pm and 7:30 pm; it's okay to start a little earlier if you are marketing only to retirees. For webinars, you may consider starting earlier in the day, with popular times including 11 am and 2 pm.

DO choose the right day of the week.

The best days to hold events are Tuesdays, Wednesdays and Thursdays. This holds true for both in-person events and webinars.

DO make it easy for prospective attendees to make reservations.

For webinars, use a quick, easy form fill on an event landing page. For events with an RSVP phone line, reservation call-ins should be handled by a live contact and made available 24 hours a day.

DO use an appealing direct-mail invitation or targeted digital ad.

Choose colorful designs and attention-grabbing language that will stand out from other mail or ads.

DO provide takeaway content.

Provide a workbook or other collateral that supports the information you deliver during your presentation. Let attendees know that takeaway content is available, so they can concentrate on you instead of their notes.

Don't

DON'T expect working prospects to leave work early to attend your event, and don't expect prospects of any age to attend a seminar event that ends later than 8:30 pm.

DON'T hold events on weekends, holidays, the dates of major sporting events, or election days.

DON'T ask too many questions on event registration forms or entrust your reservations to someone who cannot knowledgeably answer basic questions about the event.

DON'T cut corners on the event invitations and promotion. This is your first chance to connect with prospective clients. You want them to notice you and have a positive first impression.

DON'T provide generic takeaway content. Be sure it is branded for your financial practice and includes your contact information.

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Tuesdays, Wednesdays, and Thursdays are recommended days to schedule seminars.
Use caution with the following, because a conflict may result in poor attendance.

- Mondays and Fridays because weekend activities can make attendance light on these days
- Sundays and holidays are not recommended
- Days before and after holidays
- The first week in January
- Easter/spring break
- Thanksgiving week
- The last two weeks in December
- Sporting events—nationally and locally—e.g., Monday Night Football, the World Series

JANUARY						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
					1 <i>New Year's Day</i>	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18 <i>Martin Luther King Jr. Day</i>	19	20	21	22	23
24 31	25	26	27	28	29	30

FEBRUARY						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14 <i>Valentine's Day</i>	15 <i>Presidents' Day</i>	16	17 <i>Ash Wednesday</i>	18	19	20
21	22	23	24	25	26	27
28						

MARCH						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14 <i>Daylight Saving Time Begins</i>	15	16	17 <i>St. Patrick's Day</i>	18	19	20
21	22	23	24	25	26	27 <i>First Day of Passover</i>
28 <i>Palm Sunday</i>	29	30	31			

APRIL						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
				1	2 <i>Good Friday</i>	3
4 <i>Easter Sunday</i>	5	6	7	8	9	10
11	12	13	14	15 <i>Tax Filing Deadline</i>	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

MAY						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16 <i>Mother's Day</i>	17	18	19	20	21	22
23 30	24 31 <i>Memorial Day</i>	25	26	27	28	29

JUNE						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27 <i>Father's Day</i>	28	29	30			

JULY						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
				1	2	3
4 <i>Independence Day</i>	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

AUGUST						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

SEPTEMBER						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
			1	2	3	4
5	6 <i>Labor Day</i>	7 <i>Eve of Rosh Hashanah</i>	8 <i>First Day of Rosh Hashanah</i>	9 <i>Second Day of Rosh Hashanah</i>	10	11
12	13	14	15 <i>Eve of Yom Kippur</i>	16 <i>Yom Kippur</i>	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

OCTOBER						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11 <i>Columbus Day</i>	12	13	14	15	16
17	18	19	20	21	22	23
24 31 <i>Halloween</i>	25	26	27	28	29	30

NOVEMBER						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	1	2 <i>Election Day</i>	3	4	5	6
7 <i>Daylight Saving Time Ends</i>	8	9	10	11 <i>Veterans Day</i>	12	13
14	15	16	17	18	19	20
21	22	23	24	25 <i>Thanksgiving Day</i>	26	27
28 <i>First Night of Hanukkah</i>	29	30				

DECEMBER						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31 <i>Christmas Eve</i>	<i>Christmas Day</i>