HARTFORDFUNDS

Our benchmark is the investor.℠

Client Seminar Planning Checklist

Client seminars are an excellent way to connect with clients and prospects. By having a plan, you can execute the process with ease.

To start the process, please contact your Hartford Funds advisor consultant or their internal advisor consultant counterpart, who are available to help.

PRE-GAME: CLIENT SEMINAR TIMELINE

8 weeks

- [ ] Select the preferred date, time, and location
- [ ] Contact your advisor consultant; confirm date & availability
- [ ] Select the goals you wish to accomplish
- [ ] Select your target audience

7 week

- [ ] Set the budget
- [ ] Choose the venue
- [ ] Create the guest list
- [ ] Order invitations & marketing material

6 weeks

- [ ] Finalize the guest list
- [ ] Reserve the location & discuss any special arrangements: parking, seating, audio/visual equipment, menu
- [ ] Start planning your opening & closing remarks
- [ ] Book any special guests who can add value to your event/seminar (optional)

5 weeks

- [ ] Mail invitations (include directions & parking instructions); ask for a response two weeks prior to the event

4 weeks

- [ ] Review seminar content

3 weeks

- [ ] Begin follow-up calls or emails to invitees who haven't responded

2 weeks

- [ ] Confirm all arrangements with the venue (food, seating, parking, special equipment)
- [ ] Review final details with your Hartford Funds advisor consultant
- [ ] Practice your opening & closing remarks

1 week

- [ ] Place reminder calls or emails to each confirmed attendee
- [ ] Ensure you have all the material you need for that day: handouts, business cards, a sign-in sheet, and thank-you gifts
- [ ] Create name tags

DAY OF THE EVENT

- [ ] Bring your appointment book so you can lock in appointments.
- [ ] Arrive at least an hour early to set up and familiarize yourself with the venue.
- [ ] Greet everyone as they arrive; make sure they receive a name tag and sign in.

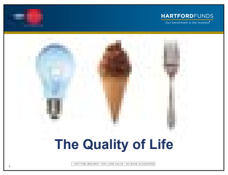
POST-GAME: FOLLOW-UP

After the event

- [ ] Send a personalized thank-you note to attendees and offer to answer any questions.
- [ ] Contact attendees and schedule an appointment with them.
- [ ] Contact the people who confirmed but weren't able to attend and schedule an appointment with them individually.

Popular Seminars

Hartford Funds offers timely and relevant client seminars on a broad range of topics to engage and motivate clients and prospects.



The Quality of Life (SEM_QOL)

Three Questions That Predict Future Quality of Life

Our research partner, the MIT AgeLab, has identified three questions that can predict future quality of life. These eye-opening questions make a seemingly distant retirement more concrete and help clients and prospects see how you, as a financial advisor, can effectively help them navigate it.

Beyond Investment Illusions (SEM_VOA)

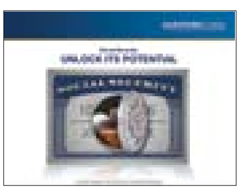
When It Comes to Your Clients' Financial Future, Perception Is Everything

Rash investment decisions fueled by short-term market moves can be damaging to your clients' portfolio. Help them stay consistent in their investment strategy by debunking commonly held myths about investing.

Media Replay (SEM_MR)

Crisis of Today...or Yesterday?

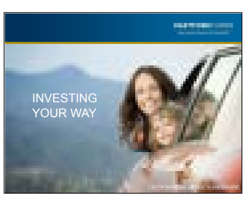
Pervasive negativity in financial news can create a distorted perception of reality. Curb clients' impulsive decisions when the next "crisis du jour" makes headlines by showing them the market's long-term ability to grow wealth despite recessions and bear markets.



Social Security (SEM_SS)

Unlock Its Potential

Many retirees will depend on Social Security for retirement income but don't realize how key factors like timing, work, and taxes can affect their benefits. Educate clients and prospects about some of the available options—and implications—for taking Social Security benefits.



Investing Your Way (SEM_WI)

Investing from a Woman's Perspective

While women may share financial goals similar to men, they need to approach investing differently, so their journey may take a different route. Build and strengthen relationships with female clients by recognizing the challenges they face and educating them about their options.

For more information, contact your Hartford Funds advisor consultant directly, or call 800-456-7526.

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