

**Achieving Financial Security:  
A Community Forum**

# Chapter Implementation Guide



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## Introduction

Congratulations on having decided to hold an AFS Forum in your Chapter. This booklet will help you host a successful program by providing step-by-step guidance through the process, from pre-event planning through to post-event follow-up. The ultimate key to success is thorough planning, so please review this guide at the outset and then keep it handy and refer back to it often as you move through each phase of the project.

The guide has been compiled as a result of our current experiences with this program. It is intended to be a living document, so please keep that in mind as you proceed, and let us know how your own Chapter's experiences can improve the content here. Your fresh ideas and different approach to the issues every Chapter may face as they organize their own events are valued contributions that will help other Chapters enjoy successful forums.

Remember also that National staff and resources are available to assist you in this very worthwhile endeavor. Feel free to reach out with any questions or concerns you have that are not addressed in this document. Contact Caprice Evans at 610-526-2507 or [cevans@societyoffsp.org](mailto:cevans@societyoffsp.org).

## Getting Started

You will need to assemble a Planning Committee who shares the vision and desire to bring this program to the underserved in your community. Each committee member's contributions and responsibilities should be clearly delineated. Identify a project leader and ideally, at least one committee member for each of the major areas outlined below.

Good planning is a critical component of a successful event. See Appendix 1 for a sample timeline to help you plan appropriately. **A thorough review of this document will provide an excellent overview of the step-by-step planning process required to achieve a successful event.**

Once you have assembled a team that is clear on the objectives to be addressed and their respective roles in achieving them, you can start the planning process by considering the key issues/tasks involved. Briefly, these are:

- Identify your target audience
  - o Which segment of the underserved will you address: can be targeted by age, gender, ethnicity, or other need that you and your Committee deem appropriate
- Identify an organization to partner with
  - o Should share compatibility with mission/purpose of the program and may share an affinity with target audience
  - o Should share commitment to the success of the program
  - o Should have a trusted connection with the target audience (e.g., a community church)
  - o May be influential in choosing the date of the event

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- Identify an appropriate venue
    - o Should be willing to make necessary commitment to success
    - o May share a trusted connection with the target audience—e.g., a church that is prominent in the community
    - o Ideally can offer onsite resources that will keep costs down (seating, a/v, etc.)
    - o May be influential in choosing the date of the event
  - Build a program that targets your chosen audience
    - o Determine what your program will address, whether you will use the case study format in the template provided by national or create a “customized” agenda
  - Identify a moderator
    - o Should be a member of the community
    - o Should have excellent presentation skills, facilitate interaction, etc.
  - Identify panelists
    - o Should be members of the community
    - o Should reflect the audience (race, gender, etc.)
    - o Should represent diverse disciplines (based on content/topics to be covered)
  - Prepare a budget
    - o Remember to include items like a/v, F&B, gratuities/contributions, etc.
    - o Assign responsibility for soliciting sponsorships, donations
  - Create a marketing/promotion plan
    - o Identify objectives, strategies, tactics
    - o Create promotional materials (with assist from national)
  - Consider logistical details
    - o Create event registration page/process
    - o Plan staging
    - o Coordinate audience materials, if any
    - o Budget for food, beverages

In the rest of the guide we will examine each of these areas in greater detail.

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## **Identifying the Need: Who Is Your Target Audience?**

The goal of the Achieving Financial Security program is to bring an increased level of financial literacy to the traditionally underserved segments of our communities. This does not imply that we are addressing the needs of those who don't have financial resources. To the contrary, we are speaking to those who are lacking in knowledge about how to handle their money. These people may have questions about how to fund their children's education or how to improve their credit rating or how to plan for retirement—the lack of information is wide-reaching and has serious consequences.

One of your first tasks is to determine which segment of the underserved population your program will address—in other words, define your target audience. This decision will influence your program content as well as your speaker selection, chosen partners, and maybe even your chosen venue.

You may choose to primarily take on the issues facing those of a particular age or ethnicity or gender. Of course there will be some overlap, but it is important to identify the primary group around whom you will build the program.

## **Identifying a Hosting Partner**

The ideal host will be an organization that is a trusted part of the community and has a particular connection to your target audience. Oftentimes this will be a church, which can also then resolve the question of venue and impart an immediate credibility to both the messenger and the message.

Your hosting partner should represent a strong, positive presence in the community, and should share the vision and goals of the forum. In addition to churches, you can approach community organizations such as Big Brothers/Big Sisters, the United Way, the Salvation Army, community centers, schools, or libraries and ask them to partner with you.

Finding a hosting partner may influence the date you choose for the forum, so plan accordingly.

If you feel you need an ice-breaker and a way to overcome objections, national has a brochure you can present potential hosts that can start a good conversation and address their concerns (see Appendix 2).

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## Identifying a Venue

### Hosting Partner May Provide Venue

If you are working with a host that provides a venue for the forum be sure the site can accommodate the crowd comfortably and meet needs such as a/v requirements, etc. Even if there are no fees, it may be customary to give gratuities to the venue or those who assist you.

### The Search for a Venue When Host Doesn't Provide One

If you are not working with a hosting organization that can provide an appropriate venue for the forum, you will need to look at locations that can accommodate the size of the crowd you hope to draw, the ease of accessibility, and how well it addresses your audiovisual needs. (For more about a/v needs see checklist, below.) This may also have an impact on the date you choose for the forum. You will want a venue that is familiar to and comfortable for your target audience. Places such as churches, schools, community centers, school auditoriums, libraries, borough/ township halls may be good options. Avoid an office or a business environment.

Never reserve a venue without visiting it personally to ensure that it is the proper size and configuration for your plans. Ensure that physical property issues (unlocking doors, parking, lighting, set up, clean up, etc.) are addressed and documented.

### Sample Audiovisual Checklist

Here is an a/v checklist to keep in mind:

- LCD projector and laptop for videos and presentations
- Video screen or blank wall
- A microphone for each panelist and the moderator
- The ability to plug in to house sound
- An A/V cart is helpful
- Check for power outlets, anticipate any needs for an extension cord
- Check ahead of time for any feedback issues
- Check location of lights, dimmers
- Can the panel be seen by the audience or is a riser needed?

When evaluating potential venues, keep in mind the set-up of the room must accommodate staging that allows the panel to be seated together at a long table at the front of the room, a table in the back of the room for literature and presenters' business cards etc., and seating that allows attendees clear sight of speakers and video screen. Find out when you will have access to the meeting space; it's desirable to do the setting up the day before the event.

It is always desirable to use a venue in which staff/volunteers share your commitment to delivering a quality program to the community. In this way responsibilities for physical property issues are given the importance they deserve, and some of the elements integral to the success of the day are in the hands of experienced, and vested, persons.

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## Building Your Program

The format is designed to accommodate a 2- to 3-hour session presided by a moderator with a panel of financial professionals from different areas of specialty. There is a tremendous amount of flexibility with how you put your program together. Keep in mind that audience interaction and interaction among the panelists is important.

*NOTE:* As noted, suggested running time is 2-3 hours, and optimal timing is 9:00am-noon. In this way you can serve coffee, tea, water, and light refreshments without incurring too much cost. If the budget allows, you can include “portable” food items like bagels or muffins. Plan to start your program at 9:30, to allow attendees to arrive, get coffee/tea, and find a seat.

You have the option of creating an original program or using the case study and related materials provided by national.

The sample case study national provides, available for download on the Chapter Resources page of the AFS Web site, is a turn-key package and includes:

- A video of the case study, outlining the family’s story
- Scripts
- PPT presentation

The multi-layered family story depicted in the video allows you to pick from among several possible story lines and tailor your content to the audience. We recommend you show the audience the entire video, and then tell them which of the questions raised will be covered in your session today. Even when using the case study provided by national, you have the flexibility to make the program your own, and incorporate the expertise of the panelists to address the needs and interests of the audience.

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## Identifying the Moderator

The choice of moderator is critically important. The moderator keeps the program moving, makes sure all of the panelists stay involved, and handles questions from the audience. It is important that the moderator is someone who really connects with the audience and sets the tone of the meeting. He/she should also have a solid understanding of the value inherent in multiple disciplines and related client needs.

It's best if the moderator is familiar with the video and knows what the key messages for the target audience are. The person you choose should be made aware of the pre-meeting time involved for preparation.

Your moderator should be a member of the community, and reflect the audience you intend to draw.

There is a Tip Sheet for Moderators in Appendix 3.

## Identifying the Panelists

Once again it is important that the panelists reflect the community you are addressing. This builds a sense of trust between the panel and the audience and aids a critical part of the marketing process. It also reinforces the message that the guidance the audience needs is available to them right there in their own community.

A few other things to keep in mind:

- Select panelists who can represent the different areas of specialty your program is designed to address. If you are using the case study from national, there are roles for: an attorney (estate planner with knowledge of property law), an accountant, a financial planner, a retirement specialist (with expertise in Social Security), and a life insurance professional (annuities, long-term care)
- One person may be able to cover two roles – you want to be sure that everyone has a chance to speak, so don't overload the panel.
- You need true collaborators who subscribe to the service mission of the program, and are not doing this for self-promotion.
- Think about having age diversity on your panel. The younger audience members will often identify with their own generation.
- If your panel members do not know each other, plan several face-to-face meetings before your program. This will help the panel gel and make it easier for them to work with each other during the program. Have them discuss their respective areas of expertise. It will also help the moderator develop a synergy with the panelists, which will enhance the value of the program.

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## Financial Considerations: Offsetting Expenses with Sponsorships

Budgeting is an important part of the planning process. A member of the Planning Committee should be assigned the responsibility for tracking costs and authorizing payments. Expenses will vary depending on the venue selected among other factors, but here is a list of sample budget items to consider that will remain fairly consistent across all programs:

- Venue rental (to include any fees but also gratuities, donations, etc.)
- Equipment rentals: a/v (microphones, laptop, projector), seating, tables, table covers
- Food & beverage
- Promotion (to include printing and public relations placement costs, if any)
- Any travel, parking, accommodations for speakers, staff, if needed

The best way to offset the costs of the program is soliciting sponsorships from within the community.

### Some things to consider before soliciting sponsorships:

- Do you want to offer an exclusive sponsorship or have multiple smaller sponsorships? Exclusive sponsorships generally bring in more money and can be valuable if you are considering having multiple programs. This shows continuity across multiple events and broader coverage for the sponsor. This, however, should not be a mandatory feature of your sponsorship pitch.
- How will the sponsor's brand increase from the sponsorship (although this should not be a primary reason for the sponsorship)? The sale more closely aligns with the sponsor "giving back" and should match up with a sponsor's own efforts to gain branding and deliver value in underserved communities (not underprivileged).
- Create a list of expenses that the sponsorships can offset (food, pens, rental space, etc.)
- Do you want to offer naming rights or a Title Sponsorship (for example, "FSP Achieving Financial Security" sponsored by XYZ Company)? This can make the sponsorship more attractive, driving in more dollars.
- With whom has your host or venue (church, civic organization, club) worked successfully in the past?
- Identify what new products or services prospective sponsors want to showcase, so you can show the prospect how they fit in with your event or sponsorship. (For example, if a sponsor has consumer material that describes how to set up a household budget, then that would be appropriate to display at the event). Keep in mind, you **do not** want any type of sales materials at the event – keep it to consumer information.
- Ask yourself, if you were in their place, would you say "yes?" If not, resolve the issue.

### Whom to approach:

- Anyone you have ever done business with in the past, as well as anyone that has said "no" in the past. "No" typically means not now. Look at financial and nonfinancial service organizations you may have approached.
- Companies that have publicly indicated their interest in and/or passion for providing value within underserved communities.
- Companies where current and past Board members work.
- New businesses in your town, especially those companies looking to increase awareness of their brand.
- Companies that your Chapter has bought from before. Examples include those whom you bought refreshments from for your last meeting (the local bakery or coffee shop), who provides business supplies to your Chapter (the local Staples), the sites where you hold some meetings (a hotel where you had Professional's Day), etc.

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- Your local Chamber of Commerce or Small Business Development Council, where you can find all kinds of company information on companies looking to grow, brand, and/or gain visibility in your town.
  - If you are working with an African-American church or organization in your town, especially those that you and/or Chapter members know personally, ask them about other churches or organizations in the area with which they may be familiar. Otherwise, try searching in the following locations:
    - o Your city's Urban League office
    - o Web site for Black Clergy: Google Black Clergy and your city's name
    - o Search your local African American Chamber of Commerce
    - o Log onto National Black PR Society and search for related press releases and articles
    - o Reach out to local black media for radio and television. Ask for their suggestions; they may suggest a church and also provide some much needed publicity

### **What to say:**

- Tell your prospective sponsor that they have the unique opportunity to get in on the ground floor of an exciting, new program designed to serve underserved communities.
- Show the prospective sponsor how the brand can increase from the sponsorship in the form of "giving back" and should match up with a sponsor's own efforts to gain branding and deliver value in underserved communities (not underprivileged).
- Tell them that they will have a table in the back of the room.
- Offer them a chance to provide consumer literature during and after the program, and point out that they will be identified as an "existing resource in the community."
- Indicate all of the places where they will receive recognition, and in select places an element of co-branding. Caution: do not overexpose your sponsor. This is your Chapter's event, not theirs. They are assisting you.
- If appropriate, use the Pastor or other leader from your venue to pitch the sponsor. This is one of those timing issues: should you get the venue first or the sponsor first? Know your community and those you want to reach. This will dictate whom you approach first.
- "Is this something you're interested in?" This is a great question that will allow them to either say "yes" and/or tell you what else they might also be interested in sponsoring.
- Show how a sponsorship can cover a period of time as opposed to a single event (for example, are you going to do multiple events?). This shows continuity across multiple events and broader coverage for the sponsor. This, however, should not be a mandatory feature of your sponsorship pitch.
- "What time of year is the best for you to get involved?" Then, if appropriate, coordinate this with the venue.
- "What benefits are you most interested in?" Saying this will show your prospective sponsor your willingness to be flexible in putting together their sponsorship benefits.
- If your prospect says "no" then ask when you might be able to follow up again. This will help should you decide to do more than one Community event.

***In preparation for a discussion with a potential sponsor, check the AFS Web site for additional information on the value of being associated with this program.***

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## Marketing and Promoting Your Event

The Community Forum is an event you must advertise—early and often. Start posting flyers about two months before the event so attendees can save the date. As the date gets closer, put out more details about the program—speaker/moderator names, topics to be discussed, etc. Add pictures to the flyers and distribute them to local businesses and stores.

Ask your host organization and sponsors to talk up the event and help spread the word and encourage people to attend. Don't underestimate the value of word-of-mouth endorsement.

A sample Marketing and Communications Plan is included here, Appendix 4.

### Customized Flyer

**National will produce a customized PDF for you to print flyers.** For a sample flyer, see attached Appendix 5.

Call or email when you have all the information that should be included:

- Date, time and location (with address) of program
- Host name
- Names of program speakers and moderator (with designations)
- The role each speaker plays (ex: Attorney, Financial Planner, Social Security Expert)
- Photos of each speaker
- Short quote from host/sponsor recommending the event and why
- You will want to add: This program is consumer education and not sales presentations.
- Who to contact for questions.
- 4-5 questions that will complete this: "Find the answers to the questions that affect you, your family and our community. This FREE program will address the financial challenges many in our community face."  
(Make sure that the questions will be covered in the topics you have chosen.)

#### Example:

- o Do you have serious questions about when to collect Social Security?
- o How to manage your debts and spending?
- o How can you make sure your will is carried out?

### Press Coverage

You will want to consider generating local press coverage either in print, on radio or possibly as a PSA on television. For full details and more information, consult Appendix 4, a sample Marketing and Promotional Plan, and Appendix 6, a template press release. And remember, national is available to assist you with your marketing and promotional efforts.

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## **Registration, Handout Materials, and Post-Event Follow-up**

### **Registration**

If you have advance registration it must be flexible enough to encourage last-minute decisions to attend. Your host partner and/or venue may be able to give you a rough estimate of attendance based on their experience with past events; this will help you plan appropriately (for food and beverage, etc.)

Remember if you choose to do registration online that not everyone has access to the Internet, so again, accommodations for other means of registering should be made.

### **Handout Materials**

If you choose to have program-related handouts on the day of the forum, either have them on the chairs before attendees enter the room or have greeters available at the door to distribute them. It is recommended that supplemental materials (e.g., materials from the sponsors, surveys [see below], Social Security Web site information) be made available after the program.

### **Post-Event Follow-up**

We suggest that you ask attendees to complete a short survey after the forum. This will provide valuable information with regard to where the community found value, how effective your promotion/communication about the event was, whether or not there is sufficient interest in holding another program, and also offer attendees the opportunity to request follow-up with any of the panelists.

A sample survey is attached as Appendix 7. Feel free to use it as is or modify as you prefer.

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APPENDIX 1

## Sample Planning Timeline of Events

### TIMELINE

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#### 3-6 MONTHS PRIOR TO EVENT

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Determine the need of underserved in the community

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Meet with and present the value to the host of chosen community/venue

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Visit venue site and reserve date

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- Review space set up, AV, parking, F&B, volunteers, fees, table/chair supply, materials needed
- 

Set tentative theme/topics for discussion

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"Save the Date" on venue website/newsletter/bulletin

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Set budget to include fees/gratuities/donations/F&B/AV

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Identify and get commitment from moderator/speakers

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Identify volunteers and define their roles in this project (advertising, sponsorships, etc.)

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Identify possible sponsors and sponsorship items and make the approach

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Contact FSP National for customized promotional materials

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#### 3 MONTHS PRIOR TO CONFERENCE

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Schedule several face-to-face meetings and conference calls with panelists

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Develop marketing strategy and timeline

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- Other Church's Bulletins
  - Radio, TV, Newspapers
  - Personal invitations from Pastors
  - Post flyers in libraries, post offices, convenience stores
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#### 2 MONTHS PRIOR TO CONFERENCE

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Ask Pastor to announce program to outside clergy and other church bulletins

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Continue marketing efforts

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Continue PR Efforts

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## **TIMELINE**

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### **1 MONTH PRIOR TO CONFERENCE**

Post flyers at venue; ask Pastor to encourage people to attend

Handouts due

Signs, name badges, program materials, registration materials printed

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### **2 WEEKS PRIOR TO CONFERENCE**

Send reminders to speakers of date, time, place

Schedule a conference call of the panel to review the program

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### **1 WEEK PRIOR TO CONFERENCE**

Ship supplies, handouts, signs to venue

Rehearsal of panel (face to face if possible)

Confirm F&B totals

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### **3 DAYS PRIOR TO CONFERENCE**

Discuss attendance estimate with venue for set up and F&B

Arrange for payment of gratuities and fees

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### **1 DAY PRIOR TO CONFERENCE**

Room set up if possible (tables/chairs/tablecloths/AV/F&B Station)

Bring meeting materials, signage, name badges to venue

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### **CONFERENCE DAY**

Arrive early to set up F&B, tables/chairs, AV, volunteers, papers/pens, handouts, greet panelists, sponsors, etc.

AV Check; Panelists set up

Meeting tear-down

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### **POST MEETING**

Review evaluations and write meeting summary

Review final costs and prepare budget report

Send letters of appreciation to speakers, venue, volunteers, sponsors

Provide venue with link to AFS resource page

Follow up post-event media coverage

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# Brochure for Potential Host Organization

## ACHIEVING FINANCIAL SECURITY:

### A COMMUNITY FORUM



From the Society of Financial Service Professionals  
**INCLUSION ADVISORY GROUP**

### Why are we offering this program?

*There is an unmet need in the community.*

Financial illiteracy, the inability to understand key financial concepts and manage personal finances, is rampant in America. The cost is high: lost savings and investment opportunities, lives shattered by financial loss or bankruptcy, higher prices than necessary paid for goods and services, dreams and aspirations that go unfulfilled, marital and family discord about money. It's not about lack of money; it's about scarcity of knowledge.

### Why does it matter?

*There is a real need for financial information, especially regarding retirement planning.*

The consequences of uninformed decision making can be devastating, so education is critical. Further, there is evidence that the impact of financial illiteracy is even greater when broken down by ethnicity and gender. Minorities and women have traditionally been underserved by the financial services industry. The Achieving Financial Security forum can help change that.

### Why do we want you to host the program?

*The message is important, and the messenger matters.*

The content of the program addresses a real need in your community. It's important that the message gets out, and as a trusted and respected part of this community your hosting it confirms the validity of the message (we need to end financial illiteracy) and facilitates the process (of education and guidance).

### What does the program look like?

*A reflection of the real-life financial issues we all face, with expert guidance from within the community to deal with them.*

Local financial professionals, including financial planners, lawyers, accountants, will address the financial challenges that many in our community face. The format will foster interaction among the panelists, the moderator, and the audience as they address questions like:

- When is the right time to collect Social Security?
- What is the first thing a parent should do when a child turns 18?
- How can people protect themselves from bank fraud?
- How do you finance education, manage student debt?

#### Who is the Society of Financial Service Professionals?

*A nonprofit organization with thousands of members nationwide helping individuals, families, and businesses achieve their financial goals.*

The Society of FSP accepts as members only those who have or are pursuing professional credentials in disciplines such as law, accounting, insurance, financial planning. Founded more than 80 years ago, we remain committed to ethics, education, and building relationships that elevate our industry and our level of client service. Our members hold a strong commitment to serving both their clients and the communities of which they are a part.

[Click here to download brochure from the AFS Web site.](#)

## Moderator's Tip Sheet

- 1) **Get Started on the Right Foot.** When you're introducing panelists, make sure their names and titles are correct. It's not good to be corrected on the spot. Make sure you know how to pronounce every name. OR have the panelists introduce themselves.
- 2) **Avoid Long Intros.** It slows the program down; but do add personal notes to each introduction so that the audience can relate to the panel.
- 3) **Shorter is Better.** Short, to-the-point questions are usually best. Longer questions require longer answers.
- 4) **Break Eye Contact with the Panelists.** Look at the panel, ask a question, and then look at the audience. Do not continue eye contact with the panelists, because you want them to speak directly to the audience, not to the moderator. Also, don't hesitate to tell panelists to speak louder or to get closer to the microphone.
- 5) **Let the Panelists Talk to Each Other.** Encourage panelists to talk directly to each other to create a more dynamic dialog. Don't overstructure your panel by leading into a moderator question-and-response pattern alone, allow for some healthy banter between the panelists, and let them chatter, jab, and joke among each other.
- 6) **Extract Good Information Out of the Panelists** by rephrasing, summarizing, or clarifying what they said. A good moderator accounts for only 10% of the speaking time of a panel – he/she is the "invisible hand," not the star.
- 7) **Know When to Pass the Mic.** Don't let any particular panelists dominate the session over others; you can interject between their breaths and quickly pose the same question to the other panelists. Watch the body language of the panelists, the one who wants to get a word in will be giving you nonverbal indicators.
- 8) **Get the Audience Involved Early.** If you're planning audience participation, wait no longer than 20 or 30 minutes before bringing in the audience. The longer you wait, the harder it is to get them involved. Moderators should allocate approximately 30% of the duration of the panel to questions from the audience. Just in case, always have a few good questions in your hip pocket just in case no one in the audience has a question
- 9) **Field Questions from the Audience.** Always repeat the question from the audience, so everyone can hear and it'll get on any recordings. Summarize long-winded questions from the audience. Ensure that the questions are from different folks; don't let an overactive commentator steal the show by asking too many questions. You could suggest that some discussion can be followed up after the event.
- 10) **Avoid Audience Members Lining Up at Microphones.** This approach hinders "on the spot" follow-up from audience members who feel strongly about the topic and aren't next in line. An alternative is to have assistants moving around the audience looking for people who want to ask a question. Audience members should submit written questions to be read out loud.
- 11) **Allow for Final Comments.** Allow each panelist a minute or two to respond to a final "big picture" question, such as "What one point should we take from this discussion?"
- 12) **Thank You.** Make sure you thank each panelist by name and ask the audience to join you in expressing appreciation with their applause. Thank organizers and sponsors who helped make the event possible, and let everyone know how much you enjoyed moderating the discussion and appreciated their active participation. If there is time and the panelists do not have to leave right away, let the audience know that at this time they can have one-on-one discussions with the panelists.

## **Sample Marketing, Communications and Promotion Plan**

### **Marketing/Communications Objectives**

- create awareness of and interest in the upcoming AFS event in the community
- establish the need to overcome financial illiteracy
- establish a connection between FSP and community service
- promote attendance at AFS event

### **Communications Strategies**

- Identify “Program Champions”
  - o Work with the Community Outreach person(s) at your host venue, the Salvation Army Boys and Girls Club (SAB&C) to identify organizations you can network with to reach the community the SAB&GC serves, particularly the parents of their members. Ask them to spread the word about AFS and encourage attendance at the program.
  - o Identify key neighborhood churches and approach their pastors/leaders with information about the program. Ask them to personally encourage the members of their congregations to attend the program. [FSP National can supply you with materials containing talking points, etc., if desired.]
  - o Work with area schools to identify a means of getting the message to the parents of their students (perhaps through home and school associations/parent-teacher organizations or other outlets).
  - o Approach leadership of community banks/financial institutions; explain the purpose and objectives of the program and ask them to encourage their customers to attend.
  - o Work with your panelists and your moderator to identify connections they may have to associations or individuals who may benefit from attending the program and ask them to encourage attendance.
- Having identified Champions, use their networks and connections to create awareness of the AFS program
  - o Ask for any contacts at local newspapers, radio stations, television stations; follow up seeking promotion of the program.

### **Promotional Tactics**

- Ask your host venue to announce the event on their Web site home page.
- Ask your host venue to have any organizations with whom they work promote the event.
- Ask local churches to print announcements in their bulletins, post it on their Web sites, and/or place posters/flyers on their bulletin boards.
- Contact local news stations, and ask them to cover the “good news” story of your program—a pro bono event to benefit local citizens, overcoming financial illiteracy, offering free advice and guidance, etc.
- Contact local radio stations and inquire about community announcements. Frequently you can secure a 30-second spot—which will allow you to deliver the key points about the program.

- 
- Contact local newspapers:
    - o Prepare a press release (National can assist with this).
    - o Reach out directly to the business reporter if possible, and ask them to do a story on the event. You can ask the same of any reporter you feel would be interested in doing a story on the benefit the program seeks to bring to the community.
    - o If you cannot get agreement for an article covering the event, ask if the paper has a community calendar where you can advertise the event for free.
  - Saturate the community with your promotional materials:
    - o Create posters and flyers (National can assist, if desired) with all the pertinent details and ask for permission to post them in:
      - area grocery stores,
      - convenience stores,
      - shopping centers,
      - banks,
      - libraries,
      - post offices,
      - day care centers,
      - senior citizen centers,
      - medical offices
      - any locations where residents of the area may gather.
  - If you can secure endorsement/testimonial from your Program Champions (above), publicize them via any available channel.
  - Ask your sponsors to help increase awareness of the program.
  - Use social media to get the word out:
    - o Ask any organizations you are working with to use their Twitter or Facebook platform to promote the program.
    - o Ask your faculty/speakers and moderator to use their social media tools to promote the program.

**NOTE:** National is ready to assist in the development of any materials, with copy, graphics, etc. Just let us know what you need.

# Sample Customized Event Flyer

You Are Cordially Invited To A Special Program

## Achieving Financial Security: A Community Forum



AFS Community Host,  
Address of Community Host

### Event Date | Event Time

Find the answers to the questions that affect you, your family and our community. This **FREE** program will address the financial challenges many in our community face.

- Do you have serious questions about when to collect Social Security, or how to manage your debts and spending?
- Have you ever wanted to know how to properly fund a child's education, or save for retirement?
- Do you really need a will or a trust? Family matters.
- How can you make the IRS less taxing? Developing successful tax strategies.
- Are you at risk? Fundamental and creative uses of life insurance.

Register on [www.Eventbrite.com](http://www.Eventbrite.com) under "Achieving Financial Security" or call 123.456.7890

The forum is being conducted by FSP Chapter of the Society of FSP in conjunction with Community Host.

### THANK YOU TO OUR SPONSORS



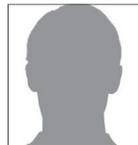
### Program Speakers:



Speaker Name  
Moderator



Speaker Name  
Attorney



Speaker Name  
Benefits Specialist



Speaker Name  
Insurance Professional



Speaker Name  
Financial Planner



Speaker Name  
Commercial Banker

The information provided during this community forum is for general educational purposes. It should not be deemed legal, accounting or financial advice and should not be acted upon without prior consideration with appropriate professional advisors.

Complimentary refreshments and lunch will be provided.

## Template Press Release

Press Release

For release: Immediately  
Contact: Chapter contact person name  
e-mail address



### **[Chapter Name] of FSP Partners with [Name of Host/Partner] to Present “Achieving Financial Security” Program**

**[city, state]** — Achieving Financial Security – an outreach program designed to provide underserved communities with access to reliable information on building financial well-being – will be held on [date], from [start time] to [finish time] at [venue name and address]. All are welcome to attend this free event.

Achieving Financial Security (AFS), spearheaded by the [chapter name] Chapter of the Society of Financial Service Professionals in partnership with [sponsor name], pulls together a multidisciplinary panel of experts to ensure participants are provided with comprehensive planning guidance. Topics for the [date] session include:

**[insert topics]**

**[insert names and titles of panelists]** will be featured speakers.

AFS program participants will also have the opportunity to engage in one-on-one education sessions with a financial service professional to tackle topics of special interest to them. Participants can ask questions about any topic including credit management, obtaining mortgages, budgeting, and any other topic of immediate interest to the participant.

**[insert names of additional sponsors, if any]** join [primary sponsor] in sponsoring this event.

The **[insert Chapter name]** Chapter of Society of FSP is a community of credentialed professionals across disciplines in financial services. It offers:

- Members spanning the entire spectrum of financial services
- Networking and learning opportunities across areas of specialty
- World-class resources and knowledge
- Commitment to the highest level of ethical client service

**[insert paragraph with Sponsor information].**

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APPENDIX 7

## Sample Post-Event Survey

### Achieving Financial Security: A Community Forum—Survey

Your feedback is very important. Please complete and place in basket as you are leaving. Thank you.

How did you hear about this event?

- Church announcement
- Flyer
- Radio
- A Friend
- Other \_\_\_\_\_

How do you rate the event location?

- Excellent
- Good
- Fair

Was the information valuable to you?

- Very valuable
- Valuable
- Not valuable

Would you be interested in attending another program on achieving financial security in the future?

- Yes
- No
- Maybe

I would like more information about:

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*Please see reverse side.*

I need help on this topic:

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I would like someone to contact me:

Name \_\_\_\_\_

E-mail \_\_\_\_\_ Telephone number \_\_\_\_\_