<u>Advisor Checklist</u>

Step 1: Customize Outlook and/or Word Template invitation with your firm's information, highlighted.

Step 2: Send out invitation to all prospects and clients two weeks prior to the first webinar date.

Step 3: Receiving RSVPs:

Enter RSVPs into attached spreadsheet. You **must** complete the red fields for each RSVP.

Below is sample email wording when you receive an RSVP

<u>If Prospect is interested and has **not** given you contact information</u>

Hello _______,

Thank you for your interest in our upcoming webinar. Please forward me your contact information including company name, phone, title, state & address. The instructions will follow under separate cover pending your contact information.

Thank you,

<u>If Prospect is interested and **has** given you contact information</u>

Hello _______,

Thank you for your interest in our upcoming webinar. Your RSVP has been confirmed and attached are the login instructions.

Thank you,

Step 4: Once someone RSVPs, please send them the registration link.

Step 5: Email support (support@rpag.com) the completed RSVP list with the subject line **SEPTEMBER HOSTED WEBINAR RSVP LIST** **one day** prior to webinar <u>if you want us to track your RSVPs.</u>

Step 6: Webinar takes place.

Step 7: Your RSVP list of attendees will be sent to you on Friday.

Please note: We **do not** track/report back any attendees who are not on RSVP lists