ADVISOR CAREER LAUNCH
EVENT GUIDE

The ideas and direction offered here are meant to serve as a guide only – there are many ways to hold a successful Career Launch event. Ultimately, the type of event you hold should be a reflection of you and the manner in which you wish to interact with prospective clients and advocates. Your SMC can help you explore your options and decide on the best approach.

WHAT IS THE OBJECTIVE OF MY CAREER LAUNCH EVENT?

First and foremost, your objective is to let key people in your personal network know about your new career as a Financial Advisor and acquaint them with First Command. Seek to schedule follow-up appointments with as many people as possible in order to further explore the possibility of them becoming a client, an advocate for your business…or both!

WHEN SHOULD I HAVE IT?

Start planning your event now so that you can get off to a quick start in building your new business. But don't rush your preparations – you only get one chance to host a Career Launch event, so it's important to get it right! Four to six weeks lead time is recommended.

WHAT ARE THE BEST DAYS OF THE WEEK AND TIMES TO HOST MY EVENT?

At the risk of stating the obvious, the best time to host your event is the time when the most people will be able and willing to attend. So if you're planning a meal at a fine restaurant with a small group of close friends, a Friday or Saturday night may be perfectly acceptable. But if you're hosting a larger, open-house-style event for a broader range of people, it's generally best to schedule it in the middle of the week (Tuesday, Wednesday or Thursday) in the early evening (5:30 or 6:00). This will allow people to stop by after work on their way home.

WHO SHOULD I INVITE?

The first step in determining who to invite is deciding what type of event you want to host. If you prefer a smaller, more intimate event, you'll want to invite those close friends you believe will be most likely to support your new career. But if you want to host a larger, open-house-style event, you should invite all of the family, friends and associates that make up your Project 100.

WHAT IS THE BEST CONTACT STRATEGY?

Here's an example of an effective contact strategy:

1. Send a "save the date" email 6 weeks prior to your event (located on the Store Front.) A letter from the DA is also available in CRM. A sample letter is on page 5 of this guide.
2. Mail printed invitations 4 weeks prior to your event.
3. Follow up with all non-RSVPs by phone 2-3 weeks prior to your event.
4. Confirm all RSVPs by phone 3-4 days prior to your event.

WHO FROM FIRST COMMAND SHOULD ATTEND MY CAREER LAUNCH EVENT?

At minimum, your District Advisor and an office staff member should be present. Ideally, your District Advisor, all of your fellow advisors and key members of the office administrative team will be able to attend as a strong show of support for you and a demonstration of First Command's team approach. From a practical standpoint, having extra hands on deck will also make it more likely that everyone who attends will be personally greeted and make it easier to set follow-up appointments.

WHAT IS MY DISTRICT ADVISOR'S ROLE?

Your DA is there to say all of the nice things about you that you wouldn't feel comfortable saying about yourself! Like how excited he or she is that you are joining the firm, what an outstanding person you are and maybe even how prepared you now are to help everybody in attendance get their financial lives squared away! In addition, the DA should – at an appropriate time during the event (usually 15 or 20 minutes in, when attendance is at its peak) make a few introductory and congratulatory remarks about the new advisor.

Sample introduction:

Good evening, ladies and gentlemen. My name is ______ ______. I am the District Advisor for First Command Financial Planning here in ______. I want to thank you for joining us this evening to celebrate the very exciting addition of NEW ADVISOR NAME to our talented lineup of advisors. INSERT BRIEF DESCRIPTION OF NEW ADVISOR'S BACKGROUND.

- Describe why they hired new Advisor, to include positive personal traits and previous experience
- Talk about why they will be a good fit within First Command's family culture
- Briefly describe what they will be doing to advance First Command's mission
- Play the *Your Financial Life* video "to help them better understand our unique approach to helping people get their financial lives squared away"

HOW SHOULD I SELECT THE VENUE FOR MY EVENT?

There are many factors to consider in choosing the right venue for your Career Launch Event, including:

- The expected number of guests
- The convenience of the location for most guests
- The availability of parking
- The overall atmosphere of the venue, including whether it offers adequate privacy
- Food quality
- Cost

Any of the following venues could be considered as an option, depending on the type of event you envision and the considerations listed above:

- A casual neighborhood restaurant with private room
- An upscale restaurant with private room
- Your First Command office (if space and environment allow)
- Your home
- A private suite at a local sports stadium or arena
- An art gallery or museum – after hours reception or private room
- A private room in a hotel
- A country club

The most important thing is that your venue be a comfortable fit for most of your guests. A country club may be ideal if your network is older and more affluent, but it may make younger, less affluent people feel uncomfortable. A downtown hotel may be an elegant choice, but if it means that your guests will have to drive far out of their way and encounter problems parking, it may not be the best choice. Nobody knows more about the people you will invite than you, so be sure to put that knowledge to work in choosing a venue that everyone will enjoy! And if you've got questions or you aren't sure what venue will work best, consult with your DA and SMC.

SHOULD THERE BE A SCHEDULE FOR THE DAY/ EVENING OF THE EVENT?

Yes, sketch out a timetable for the evening with your assistant. The schedule may be less structured if you hold a more casual event at your home – but you'll still want to identify times during the event for you to address the group and thank them for attending and for your DA to welcome you to the firm and (if appropriate) make a toast.

Sample 1 evening schedule:

5:30 - 6:15 pm – Guests arrive and mingle (if drinks and appetizers are served)

6:15 – 6:30 pm – Advisor and DA address attendees, play Your Financial Journey video

6:30 – 7:00 pm – Continue to visit with guests, scheduling follow-up appointments when possible. Be sure to thank all of your guests for coming as they leave and give them a folder as a take-away.

Sample 2 evening schedule:

6:00 – 6:15 pm – Greet guests as they arrive

6:15 – 7:00 pm – A sit-down dinner is served

7:00 – 7:15 pm – Advisor and DA address guest, a toast to new advisor, thank guests and visit with each guest before they leave

CAN I PAY FOR ALCOHOL AT THE EVENT?

Alcohol may be served as long as no products are going to be sold and all consumption of alcohol by guests is modest. But you should carefully review the Alcohol Policy in the First Command Compliance Manual and obtain the required approval if you plan to serve your guests. Conducting a champagne toast is permissible and can be an effective way for your DA to punctuate his remarks about your joining the company.

SHOULD I ATTEMPT TO MEASURE THE RESULTS FROM MY EVENT?

Absolutely! One week after the event, review with your District Advisor what worked and what didn't. Discuss whether the event was helpful in scheduling appointments and building advocates for your business. Talk to your SMC about other ways to include this audience in your future marketing efforts.

WHERE CAN I FIND MARKETING MATERIALS FOR MY EVENT?

For invitations and event materials visit the Marketing Tools page on OneNet. The Advisor Career Launch link is located in the left hand column. From that page, you will be able to shop from a menu of marketing materials to build your personal event kit, which will then be mailed directly to you.

For promotional items or First Command logo items needed, visit the Marketing Tools page. Click on the "Name Tags, Logos, and Promotional Items" link. Two third-party vendors – Sportworx and Go Recognition Concepts offer First Command branded items.

For personalized memo pads (which can be included in your guest folders), visit the Shopping Mall page on OneNet and click on the Workflow One link to order.

WHAT EQUIPMENT AND MATERIALS SHOULD I HAVE AT THE EVENT?

- Laptop computer (for playing *DVD-61 or 62 – Your Financial Journey*)
- Projector and screen (if needed/appropriate and not provided by venue)
- Guest folders (available to order online)
- Nametags with guests names pre-printed
- Extra nametags and a Sharpie for folks that might show up without RSVP
- Pens
- Elephant in the Room Books (2 boxes are sent separately to Gateway after start date)
- A printout of your calendar
- Your camera

Recommended items for guest folders:

- Advisor Profile (a one-page bio with photo available from Marketing)
- Business card
- Corporate brochure 126, *Get Your Financial Life Squared Away*

Where can I get additional information on how to host the event?

- Use the Advisor Career Launch Checklist (on page 4 of this guide).
- Meet with your office staff that will be assisting with the event to review and assign responsibilities.
- Review your plans with your Strategic Marketing Consultant (SMC)

WHEN SHOULD THE POST-EVENT FOLLOW-UP OCCUR?

Be sure to block off your calendar for an adequate amount of time the day after your event to:

- Send a handwritten thank-you card to each guest.
- Send appointment reminder cards to all guests who made appointments during the event.
- Send a short, personal note with a folder to each person who was invited, but unable to attend. Include a copy of the DVD, *Your Financial Journey* (DVD-61) and the corporate brochure (#126). Offer to schedule an individual meeting with them or meet for morning coffee or lunch. Let them know you'll follow up soon.

ADVISOR CAREER LAUNCH EVENT CHECKLIST

Event Date: ____________

STEPS	TIMELINE	DUE DATE	COMPLETED
Select date and discuss event details with DA	5 weeks out		
Reserve local restaurant / club room	5 weeks out		
Mail invitations	4 weeks before		
Phone follow-up with non-RSVPs	3 weeks before		
Discuss event schedule with staff	2 weeks before		
Test video/ computer for DVD	2 weeks before		
Send Event Reminder Email	1 week before		
Prepare guest folders	1 week before		
Call to confirm attendees	4 days before		
Pick up/buy food or make final confirmation with location	1 day before		
Send thank-you notes & any appt. reminders	1 day after		
Recap with DA	1 week after		

APPROVED SAMPLE LETTER INVITATION FROM DA

February 10, 2014

«GUEST NAME»
«GUEST ADDRESS 1»
«GUEST ADDRESS 2»
«CITY», «STATE» «ZIP»

Dear «INFORMAL SALUTATION»,

As the District Advisor for the «CITY» area, I am pleased to announce that «FIRSTNAME LASTNAME» will be joining First Command Financial Services on «START DATE». For more than 50 years, First Command Financial Advisors have assisted individuals and families in the pursuit of their financial goals and lifetime dreams.

«FIRSTNAME» specifically requested that I include you in the select group of family, friends and associates we are inviting to celebrate «HIS/HER» new career. This fun, casual event will take place at «00:00 p.m.» «DAY», «MONTH 00», at «EVENT ADDRESS».

«FIRSTNAME» has spent the last several months immersed in a rigorous training program, and I know that «HE/SHE» would greatly appreciate your attendance at this event. To assist us in our preparations, please let us know if you'll be able to attend by responding at your earliest convenience to «AA» at «PHONE_NO.». On behalf of «FIRSTNAME LASTNAME», thank you for your support of «HIS/HER» career.

Sincerely,

«AGENT_NAME»«CFP»
«ADV/DA»

NOTES

NOTES

1 FirstComm Plaza
Fort Worth, Texas 76109-4999
1.800.443.2104
info@firstcommand.com
www.firstcommand.com

1-33 (3/14) 03204