

Event Checklist

Choose & Commit

- Pick a date/time (5:30 PM dinner events perform well)
 - Allow 2-3 weeks for registrations
- Secure a low-cost or free venue with private room (semi-private OK too, depending on layout and noise level)
- Source/Check your data
 - Consider age, LTV, those with lien perform best
 - Within 10-15 miles of venue, depending on area and traffic
- Choose a topic
 - “Understanding Home Equity in Retirement”
 - “Using Home Equity to Age in Place”
 - “Reverse Mortgage Myths vs. Facts for Seniors & Families”

Partner & Promote

- Create a simple registration page (name, age, email, phone)
 - Constant Contact is a great tool for email and event registrations
- Draft a short invite email + reminder email, and/or mailer
- Post on Facebook (Meta), local Facebook groups and/or senior community boards
- Share with your business partners and ask them to promote to their lists
- Call to confirm each attendee, introduce yourself and start to build rapport

Content & Compliance

- Build a 30–45 minute educational presentation (MOO branded PPT available on partner portal)
- Prepare answers to common reverse questions (FAQs provided in PPT)
- Create a simple sign-in and lead capture (Available on partner portal)
- Confirm compliance review

Execute & Follow Up

- Arrive 1-1.5 hours early and set up seating and materials
- Open with education and credibility—not product pitching
- Offer a soft CTA: complimentary consultation or follow-up call (deep dive into personalized scenario)
- Send thank-you email within 24-48 hours
- Personally call attendees who showed interest
- Add all attendees to a light educational nurture plan

