



**If you are engaging with prospects via phone or text, please remember that telemarketing laws vary from state to state, and it is the caller's responsibility to be aware of and comply with all state and federal telemarketing laws. Caller is responsible for obtaining any prior written consent required by state and/or federal law.*

It is the caller/user's responsibility to be aware of and comply with all federal and provincial telemarketing, telecommunication, and commercial electronic messaging laws. Caller/user of product is responsible for obtaining any prior written consents required by federal or provincial law.

Event Checklist

1. Register for the [Agent Business Planning Clinic](#). Once you receive your confirmation email, make sure to keep the link for use at your event. Do not share this link with agents or prospects as they will not need it if they plan to attend your event in person.
2. Find a space large enough to host your event. Make sure you have good video, audio and WIFI at the location. For the panel discussion, you'll use the Zoom webinar link to show the virtual event. For the mastermind portion, it is recommended to have a paper flip board or other means to take notes.
3. If you choose, you can reach out to your local contacts (lenders, inspectors, etc.) to see if anyone wants to sponsor your event. Sponsors could help with space rental, food/beverages, etc. Make sure to offer them time during the event to talk to the attendees and maybe even a table for before and after the event.
4. Set up an event registration site so you can include a link with your invitations to the event. This can be done through Eventbrite or any other event platform you choose. You can use the URL shortener in MAXCenter to create a short URL to use in your marketing materials.
5. Identify prospects in your market you want to contact to invite them to the event.
6. Post an invitation to your social media channels using the provided [social media invitations](#). There is recommended post copy available in

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the notes section of each slide. Just save the graphic you want to use, copy and paste the recommended post copy and tag your agents/prospects in the post so they see it.

7. View the other materials in [these folders](#) to start inviting agents and prospects and begin marketing your event. The materials consist of social graphics, sample invite copy, worksheets and more. Consider printing these out for attendees to take notes during the event.

8. Prior to the event, reach out to those registered to let them know you are excited to see them on the day of the event.

9. After the event, make sure to send a thank you to all attendees by sending a handwritten note, an email or reaching out in other ways.

***As a reminder, under brand guidelines, you are not permitted to use the REMAX marks in any pre-recorded telemarketing messages, any unsolicited autodialed calls or texts to cellular phones. Please consult the Brand Identity Manual for more information.*

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