



Updated 2024

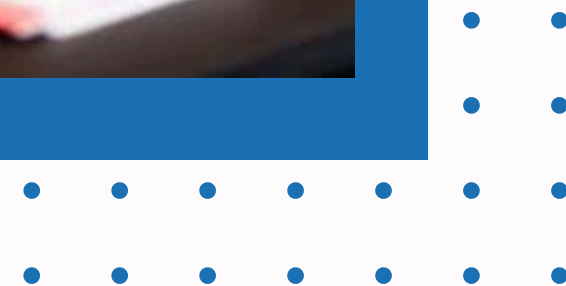
How to Plan and Host a Successful COI Event

www.cannonfinancial.com/teleconference



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PLANNING YOUR EVENT

1. Planning Your Event

Creating a Guest List

When planning your COI event, it's essential to identify key individuals and partners to invite. This may include estate planning professionals such as attorneys, CPAs, and other centers of influence who could benefit from mutual collaboration.

Sending Invitations

Once you've identified your guests, send out the invitations as soon as possible. We've made this easier for you with prepared invitation templates available for download in the Resources section of this guide:

Teleconference Invitations

(https://www.cannonfinancial.com/uploads/files/PDFs-Collateral-Documents/2025-EPTC_Invitations-compressed.pdf)





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HOSTING YOUR EVENT

2. Hosting Your Event

- **Teleconference Materials:** One week prior to your scheduled call, you will receive an email containing important details, including:
 - **Zoom:** Follow the Zoom instructions for access.
 - **Coordinator Packet:** This packet contains instructions on how to file for CE (Continuing Education).
 - **Participant Packet:** This packet includes all the topics and materials that will be discussed on the call. Be sure to print copies for all attendees.
- **Lunch Arrangements:** If you are hosting a "Lunch and Learn," organize catering ahead of time. Aim to have lunch ready 30 minutes before or after the teleconference, depending on your time zone, to allow for networking and discussions with your estate planning partners.

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MEETING AGENDA

3. Meeting Agenda

Follow this simple meeting structure to keep the conversation focused and productive:

- 1. Introduction:** Ask your center of influence to discuss their firm and describe the profile of their ideal client.
- 2. Your Client Profile:** Share the type of client your firm serves best.
- 3. Your Value Proposition:** Highlight your unique approach by explaining the 4-Point Branding Message:
 - What do you do?
 - How do you do it?
 - What are the resources of your firm?
 - Why do this with you?
- 4. Request an Introduction:** Conclude by asking, “Who among your clients would benefit from this service and feel comfortable with an introduction?”



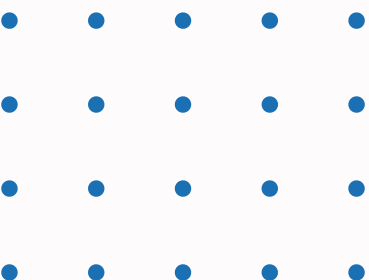
4 AFTER YOUR EVENT



4. After Your Event

After the event, focus on the following key actions:

1. **Follow Up:** Send a thank-you note to attendees and schedule follow-up meetings to discuss opportunities that were mentioned.
2. **Share Resources:** Provide any necessary follow-up materials or documentation, such as the participant packet or CE certificates.





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WORKING WITH CE




5. Working with CE (Continuing Education)

For handling CE credit after your event, make sure to:

- **Use the CE Website:** CE Submission Website <https://ce.cannonfinancial.com/>
- **Timing Reminder:** Submit attendance within 1 week of the event.
- **Late Submissions:** If you forget to submit attendance, the site will be reopened for a \$50 late fee, and Cannon will report to each agency.
- **Attendance Sheet:** Ensure you've recorded all attendees using the CE attendance form, which you'll need for submission.

Contact Laurie for CE-related Questions:

Laurie Sebestyen

 (706) 389-7645

 Lsebestyen@cannonfinancial.com



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FAQS

6. FAQs

When will I receive the materials?

You will get your materials via email a week prior to the start of the program.

Will certificates of attendance be included? How do I distribute the certificates? Do I need to type in the names?

You will receive certificates of attendance for all approved designations. You can just print them and hand them out at the teleconference. No need to type the names in.

How long do I have to enter attendees into the Cannon site?

You have 1 week to enter your attendees into the Cannon Financial CE site.

6. FAQs [C O N T I N U E D]

What if I forget to enter attendees into the CE site?

We will open the site for you to submit late attendance, and a \$50 late fee will be charged for reporting to each agency.

Do I have to type each participant's information into the CE site each month?

No. Once you've entered a participant's information, it will be linked to your record. The next time you log in as site coordinator, your past participants will be listed, and you will only need to check a box if they attended again.

After I submit attendance to the Cannon CE site, am I done?

Yes. The materials specify when participants must report their attendance and when Cannon will report for them. Site coordinators only need to enter attendance online.

6. FAQs [C O N T I N U E D]

What is the point of submitting attendance online if participants are required to report themselves to certain designations?

Cannon keeps an electronic record as proof in case of an audit (e.g., by the State Accountancy Board). If a participant loses their certificate, Cannon can reissue it from the database.

What kind of CE is this approved for?

CLE (in most states), CFP, CPA, CTFA, CLU, ChFC, CIMA, and all Cannon designations.

Do I need to fax the Attendance Form to Cannon?

No. Once you've entered attendance into the Cannon CE site, you're done. Keep the form for your personal records.

6. FAQs [C O N T I N U E D]

When will participants receive credit from reporting agencies?

Cannon will report CE for all designations within 30 days of the program.

A participant doesn't want to use their email address. What should I do?

You may use your own email address in place of theirs.

I'm going on vacation during a teleconference. Can a colleague receive the materials?

Yes. Call Alison McCormick at (706) 389-7624 or email amccormick@cannonfinancial.com to arrange for the materials to be sent to the appropriate person.



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RESOURCES

7. Resources

To make your event successful, we've provided the following downloadable resources:

- **Invitation Templates:** Pre-made invitations to send to COIs.
- **FAQs Sheet:** Common questions about organizing and hosting teleconferences.
- **Attendance Sheet:** Keep track of all attendees for CE submission.


Available on our website: <https://www.cannonfinancial.com/teleconference>






CONTACT

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