

SEMINAR MARKETING 2025

Fill Your Sales Pipeline with Qualified Prospects Using Broadridge Seminars

Whether you are hosting in-person or virtual events, the goal is always the same: to educate about the need to prepare for a financially secure future. Each title in our robust library of educational seminars is FINRA reviewed and designed to make a powerful impression, no matter the format or location.

Multi-Day Workshops

Duration: Approximately 4 to 10 hours

Benefits:

- Provide attendees with a broad, lasting financial education
- Highest prospect-to-client conversion ratios
- Largest income opportunity

Single-Session Seminars

Duration: Approximately 1 hour

Benefits:

- Establish yourself as a credible authority on specific topics
- Tailor seminars to your target audience
- Utilize for prospecting or client appreciation events

Webinars & Presentations

Duration: Approximately 30 minutes

Benefits:

- Provide information in a quick, digestible format
- Ideal for lead-generating webinars and one-on-one client meetings
- Each presentation includes an eGuide and a digital invite

Featured Seminar: Passport to Retirement®

Position yourself as an expert with this comprehensive retirement system that offers real-world education to help prospects overcome challenges and prepare for a more comfortable retirement. The eight content-rich sections and 120-page participant workbook will help attendees make sound financial decisions that can lead to retirement success: envision your retirement, assess the costs, evaluate sources of income (including Social Security), manage your tax liability, protect health and wealth, invest for the future, manage retirement plan distributions, and preserve wealth in your estate.

- Designed to be delivered in two or three sessions
- Presents thought-provoking concepts in engaging ways
- Marketing materials also available



Make a Great First Impression with Direct-Mail Invitations and Brochures

Seminar invitations are your introduction to prospects. Make your next invitation as impressive as your seminar with the help of Broadridge Advisor Solutions. We have several direct-mail options to meet a variety of needs, including premium invitation cards and printed brochures. We also have special pricing when you purchase invitations and workbooks, so ask us about these options today:

- Premium, full-color invitations with matching envelopes; invitation includes variable printing and personalization options such as your headshot and an illustration of the seminar workbook
- 4-page, 8-page, and multi-panel brochures that emphasize the educational value of the event; perfect for seminars being conducted at an educational institution or community organization



Seminar Dos and Don'ts

The best presenters have seminars (and webinars) down to a science. Take advantage of their collective knowledge to avoid common mistakes and give your events the best possible chance of success.

Do

DO choose a start time that appeals to your audience.

For in-person events, the best start time for working prospects is between 6:30 pm and 7:30 pm; it's okay to start a little earlier if you are marketing only to retirees. For webinars, you may consider starting earlier in the day, with popular times including 11 am and 2 pm.

DO choose the right day of the week.

The best days to hold events are Tuesdays, Wednesdays and Thursdays. This holds true for both in-person events and webinars.

DO make it easy for prospective attendees to make reservations.

For webinars, use a quick, easy form fill on an event landing page. For events with an RSVP phone line, reservation call-ins should be handled by a live contact and made available 24 hours a day.

DO use an appealing direct-mail invitation or targeted digital ad.

Choose colorful designs and attention-grabbing language that will stand out from other mail or ads.

DO provide takeaway content.

Provide a workbook or other collateral that supports the information you deliver during your presentation. Let attendees know that takeaway content is available, so they can concentrate on you instead of their notes.

Don't

DON'T expect working prospects to leave work early to attend your event, and don't expect prospects of any age to attend a seminar event that ends later than 8:30 pm.

DON'T hold events on weekends, holidays, the dates of major sporting events, or election days.

DON'T ask too many questions on event registration forms or entrust your reservations to someone who cannot knowledgeably answer basic questions about the event.

DON'T cut corners on the event invitations and promotion. This is your first chance to connect with prospective clients. You want them to notice you and have a positive first impression.

DON'T provide generic takeaway content. Be sure it is branded for your financial practice and includes your contact information.

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Tuesdays, Wednesdays, and Thursdays are recommended days to schedule seminars. Use caution with the following, because a conflict may result in poor attendance.

- Mondays and Fridays because weekend activities can make attendance light on these days
- Sundays and holidays
- Days before and after holidays
- The first week in January
- Local school vacation weeks
- Easter/spring break
- Independence Day week
- Thanksgiving week
- The last two weeks in December
- Sporting events—nationally and locally—e.g., Monday Night Football, the World Series

JANUARY						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
			1 New Year's Day	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20 Martin Luther King, Jr. Day	21	22	23	24	25
26	27	28	29	30	31	

FEBRUARY						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14 Valentine's Day	15
16	17 Presidents' Day	18	19	20	21	22
23	24	25	26	27	28	

MARCH						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
						1
2	3	4	5 Ash Wednesday	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24 St. Patrick's Day	25	26	27	28	29
30	31					

APRIL						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12 Eve of Passover
13 Palm Sunday	14	15 Tax Filing Deadline	16	17	18	19 Good Friday
20 Easter Sunday Passover Ends	21	22	23	24	25	26
27	28	29	30			

MAY						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11 Mother's Day	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26 Memorial Day	27	28	29	30	31

JUNE						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22 Father's Day	23	24	25	26 Juneteenth	27	28
29	30					

JULY						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
		1	2	3	4 Independence Day	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

AUGUST						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

SEPTEMBER						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	1 Labor Day	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

OCTOBER						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
			1 Eve of Yom Kippur	2 Yom Kippur Ends	3	4
5	6	7	8	9	10	11
12	13 Columbus Day/ Indigenous Peoples' Day	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31 Halloween	

NOVEMBER						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
						1
2 Daylight Saving Time Ends	3	4 Election Day	5	6	7	8
9	10	11 Veterans Day	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30				Thanksgiving Day		

DECEMBER						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14 First Day of Hanukkah	15	16	17	18	19	20
21	22 Last Day of Hanukkah	23	24	25	26	27
28	29	30	31 Christmas Eve	Christmas Day	Kwanzaa Begins	
			New Year's Eve			