

Legacy Workshop Ideas & Tips

Where to conduct workshops

- Senior Living Communities (not assisted or nursing care)
- Churches
- Community Senior Centers
- Small Business Groups
- Community Organizations

Keys to scheduling workshops

- Position as Education, not sales
- Ask if they ever have groups come in to teach on financial topics
- Leave the flyer for activities director if not present, get contact info and follow-up

Keys to a fun & successful workshop

- Help them promote - email printable announcements, stop by and help with distribution
- Make sure they are taking RSVPs
- Bring 50% more materials than RSVPs
- Refreshments - often the community will provide if you ask
- Make it FUN - engage the attendees, ask questions (see script)
- Encourage note-taking on the handouts
- Door Prizes - scratch-off tickets are fun, pick up a couple fun items at Five Below or Target

Budget

- Door Prizes: \$1-2 per RSVP (20 people = 2 \$5 prizes + \$10 scratch-offs)
- Refreshments: \$0 if community provides; \$1-2 per RSVP (Dunkin coffee & Donuts)
- Handouts: print & staple, < \$1 each, RSVPs x 1.5 (leftovers carry over :-)
- Your Name Badge: \$10?
- Hard copy presentation: Print on Card stock, laminate if desired; < \$10