



# *Helping hand:* seminar guide for education meetings

We help you with the planning so you can focus on delivering financial wellness education. Use this handy checklist to make your next meeting a success.



## Getting started (one month before the seminar)

Review your strategy and education plan for the company.

Examine all topics [available](#).

Discuss your ideas with your client and choose a presentation:

- Review the presentation and select/customize slides that meet your audience's needs (e.g., appropriate website, employer match, or consolidating accounts).
- Set a date and book a location.

## Inviting participants

### (three weeks before the seminar)

Send out the meeting invite—they can use the template we offer and reminder to participants or give them to your client to distribute.

Provide a meeting announcement poster to your client.

## Setting the stage (one week before seminar)

Touch base with the client to reconfirm details.

Presentation:

Date:

Location:

Time(s):

No. of attendees:

Language:    English    Spanish

List any equipment needed (e.g., projector, Wi-Fi hotspot, or microphone/speakers).

Collect key information about the plan to share with participants, if there are questions about their retirement plans.

Make sure you have all relevant content for the meeting (e.g., presentations or handouts).

Load the presentation to your laptop or tablet.

## Holding the meeting (day of the seminar)

### Before the seminar

If offering a webinar:

Load the presentation to the webinar program.

Set up the webinar and chat features, if any.

Start the recording, if applicable.

Capture the attendee list from the webinar.

If offering in-person:

Bring everything that you need to the meeting, including:

Laptop/tablet with the presentation

Printout of the presentation

Speaker notes on the presentation

Any equipment you need, including projectors

Handouts or giveaways you may have

Name badges or tent cards

Paper and your business cards, if applicable

A participant sign-in sheet

Set up the room in a way that helps encourage discussion.

Test connections and equipment to make sure that they're working.

If using the live digital tools, open all links in a browser window.

Display the slide with the appropriate website/phone number while participants are gathering to help them log in to their John Hancock account before the meeting starts.

### After the seminar

List appropriate follow-up information on the last slide.

Return any equipment you may have borrowed.

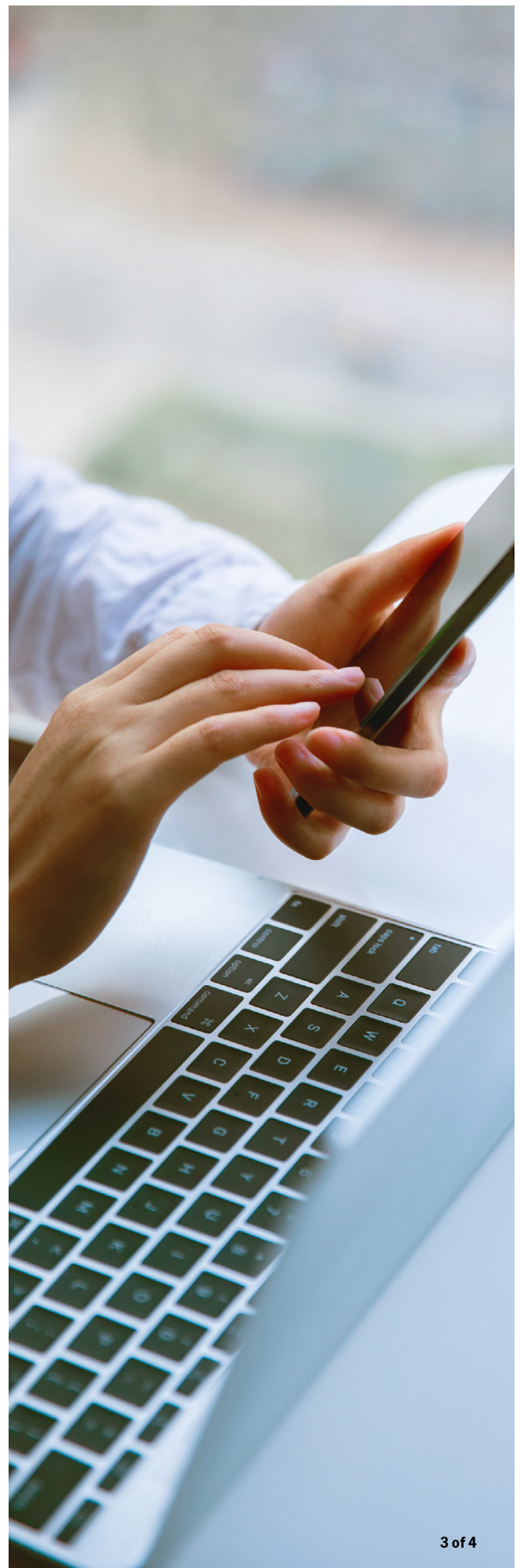
## Follow-up (day after the seminar)

Send out a thank you message to participants, and include additional education materials based on the discussion in the meeting.

Recap the seminar with the plan sponsor and determine next steps.

## Best practices for education meetings

- ✔ **Think about your target audience**  
Select a presentation that's most helpful to them. Keeping a meeting to around 15 people can help encourage discussion and interaction among participants.
- ✔ **Test the logistics**  
You don't want to be stressed on the day of a meeting—confirm the space, and test out any projecting equipment or Wi-Fi hotspot you'll need in advance.
- ✔ **Practice makes perfect**  
These presentations are structured to be customizable, and they contain elements that need preparation. Review the content and practice delivery so you're comfortable with the material.
- ✔ **Send—and send again**  
Email the participants the details of the seminar about three weeks in advance, then send a reminder about a week before and work with the plan sponsor to display the information on posters.
- ✔ **Help the conversation**  
Providing name badges or tent cards helps participants get to know one another and helps you steer discussions. It's always nice to refer to participants by name.
- ✔ **Have fun**  
These meetings are meant to be interactive, and the more comfortable you are, the more at ease the participants will be. You're helping them make good financial decisions—so why not have fun along the way?





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