

## Worksheet for Developing Life Event Meetings

What are your goals for your review meetings?

When you consider your target market, what meetings come to mind?

When you consider your vision for your practice, what meetings come to mind?

When you consider your marketing goals, what meetings come to mind?

Some ideas for your own Life Event Meetings include:

<p><b>Growth and development events</b>                      Joining the military                      Children start their career                      Singles get married                      Home buying                      Married have children                      Children need college                      Children need post-college help</p>	<p>Clients start a business                      Empty Nesters                      Accepting senior status                      Testing retirement lifestyles                      Social Security decisions                      Home downsizing                      Clients retire                      Parents need help</p>	<p>Inheritance                      Family meeting    <b>Crisis recovery</b>                      Recover from disaster                      File for bankruptcy                      Loss of spouse or child                      Loss of a job                      Loss of your home</p>
---	---	---