Retirement Summit Program

Guide & Checklist

MAGELLAN FINANCIAL

Introduction

Across the country, leading financial advisory firms are beginning to replace dozens of small retirement seminars with a more impactful approach. Rather than hosting frequent evening presentations, they concentrate their efforts into a limited number of large-scale educational experiences known as Retirement Summits.

A Retirement Summit is designed as a full-day educational event for individuals approaching or in retirement. These events typically host between 80 and 100 attendees and are held only a few times each year. The format allows advisors to bring together retirees and pre-retirees who are serious about learning how retirement truly works and the decisions that can shape their financial future.

Unlike traditional workshops, these events are intentionally elevated to feel like a professional conference experience. They are typically hosted at premier venues such as the Westin, JW Marriott, or other high-quality conference locations that offer valet parking and comfortable meeting space. From registration and morning refreshments to catered lunch and snacks throughout the day, every element of the event is designed to create an environment that feels welcoming, organized, and worthwhile.

Each Retirement Summit is built around its own brand identity. Advisors often create simple, memorable names, such as Thrive or Flourish. The event becomes recognizable within the community through a dedicated website, social media presence, and coordinated marketing across television, digital advertising, and direct mail. Over time, the event itself becomes something attendees look forward to each year.

Throughout the day, attendees participate in a series of educational sessions covering the most important areas of retirement planning. Topics often include market risk and volatility, retirement income strategies, taxation in retirement, Social Security planning, Medicare and healthcare considerations, and estate planning strategies. Rather than relying on a single presenter, different advisors or specialists typically lead each topic so attendees can hear from experts who focus on those specific areas.

Many events also feature guest speakers, community leaders, or nationally recognized personalities who help host or moderate the experience. In some cases, well-known television personalities serve as the master of ceremonies, while other events feature special appearances by respected public figures.

A small registration fee is typically charged to attend the summit. The purpose is not to generate profit but to reinforce the value of the program and increase commitment to attendance. Tickets are typically priced at around $40 for individuals and $60 for couples. In most cases, all proceeds from ticket sales are donated to a charitable organization, allowing the event to support meaningful causes while strengthening the firm's connection to the community.

Attendees receive structured educational content throughout the day, and many events also provide a workbook to help participants follow along with the presentations and organize key ideas. By the end of the summit, individuals leave with a clearer understanding of the major factors that influence retirement success.

For those who want to go deeper, advisors typically offer a complimentary written financial plan following the event. This allows attendees to apply the concepts they learned at the summit to their personal financial situation.

The result is an experience that stands apart from traditional retirement seminars. Instead of a single presentation, attendees receive a full day of education, expert insight, and a professional conference environment designed to help them approach retirement with greater clarity and confidence.

EVENT CHECKLIST	ADVISOR COLLABORATION WITH MAGELLAN	ADVISOR’S RESPONSIBILITY
Name the event	✓	
Purchase a domain for the event landing page	✓	
Content/graphic creation for landing page and event agenda	✓	
Create PowerPoint Presentation (Based on your system/agenda)	✓ *Design PowerPoint*	✓
Event Facebook page	✓	
Determine marketing sources	✓	
Collateral materials	✓	✓ *Pay for materials*
Secure event space		✓
Food/snacks		✓
Event fee proceeds	✓	✓
Guest speaker		✓

Checklist In Detail

☐ **Name the event** (Advisor with Magellan collaboration)
- Think simple, one word.
- **Examples:** Thrive, Flourish, etc.

☐ **Purchase a domain for the landing page** (Magellan purchases with advisor collaboration)
- **Examples:** retiresimplythrive.com and flourishwithomega.com

☐ **Create content and graphics for the landing page and event agenda** (Advisor with Magellan collaboration)
- We have examples, but will require input from the advisor to personalize for your firm and event.
- This is a great way to have advisors in the office speak on a specific topic.
- **Topic Example:** Scott and Angela Winstead created the S.I.M.P.L.Y. process: **S**helter Your Money, **I**ncome Generation, **M**edicare & Longterm Care, **P**rotect Your Legacy, **L**ess to the IRS, and **Y**early Strategy Visit.
- **Agenda Example:**
  - Opening Remarks
  - Taxes
  - Legacy Planning
  - Social Security (maximization)
  - Market Volatility/Risk
  - Optional – Guest Speaker
  - Income Planning
  - Healthcare/Medicare
  - Closing Remarks

☐ **Create PowerPoint Presentation** (advisor responsible for, Magellan can assist with design work)
- The presentation will be based around your agenda and internal process. The presentation should cover retirement topics, such as – Social Security, Taxes, Income, Medicare/LTC, Risk/Market Volatility, Legacy Planning, etc.
- **Example:** Joe Wilson and team speak about "The 5 Agreements".

Another example is Scott and Angela Winstead and team speak about their "S.I.M.P.L.Y." process.

☐ **Create a Facebook page with the event's name** (Magellan creates and manages with advisor collaboration)
- This would be separate from your business's FB page
- **Example:** Thrive in Retirement's Page

☐ **Determine marketing sources** (Magellan/Advisor collaboration):
- **Mailers**
  - Our Design Team creates a custom mailer to promote the event, and we will use a cost-effective vendor. Please allow 6–8 weeks for this process.
  - Our Design Team will also develop a custom landing page branded to your firm and event. This page can be featured on your website and will serve as the central registration hub for mailer, TV, and radio traffic.
  - The mailer will include a direct link to the landing page for individuals who prefer to register online. Registration data collected through the landing page will be shared with your team in an Excel spreadsheet.
  - Individuals who prefer to register by phone will be tracked separately within a dedicated dashboard. Additional login information and access details will be provided as event logistics are finalized.
- **TV commercials**
  - Either in the current TV episodes airing in the local market
  - Streaming (Vibe) commercials (:30)
  - We would need the advisor to record content at either our studio or a local studio for us to create 30-second commercials. Another alternative would be to use a brand advocate (host: Cynthia).
  - These commercials can also be promoted on social media
- **Radio commercials**
  - Insert commercials into weekly radio shows leading up to the event (approximately 2 weeks prior to).

☐ **Collateral Materials** (Magellan/ Advisor collaboration)

- **Event Pop-up Banners**
- **Workbooks**
  - We can provide you with an example, but it will need to reflect the agenda, content, and your processes.

☐ **Secure event space** (advisor responsible for)

- This event space would need to be able to accommodate upwards of 100+ people.
- We suggest valet parking to make the process simple and elevate the prospect's experience.

☐ **Food/Snacks** (advisor responsible for)

- Advisors are encouraged to provide breakfast items, such as pastries and coffee, during registration, and lunch and additional snacks during scheduled breaks. Water bottles are strongly recommended.
- **Examples:** Ice cream bar/sandwiches, popcorn, muffins, granola bars, etc.

☐ **Event Fee Proceeds** (advisor responsible for)

- 100% of all ticket sales go directly to a philanthropic endeavor. Think of something that you resonate with to get involved or become more involved in the local community.
- **Examples:**
  - Charities for veterans/military
  - Folds of Honor
  - Travis Mills Foundation
  - Medical Charities
  - St. Jude's
  - Alex's Lemonade Stand
  - Ronald McDonald
  - Hope House
  - American Heart Association
  - Animal Shelters/Organizations
  - Natural Disaster Relief
- Our Design Team will assist with setting up the payment system through the landing page.

☐ **Guest Speaker** (advisor responsible for)

- You could use a local or national celebrity to MC the event. Another option is a host, such as Brad Johansen.