SOCIAL SECURITY

Workshop Host FAQs

1. **Q: I have signed up to become a Workshop Host. What do I do next?**

   A: Once you submit a signed Host Agreement, you will receive a welcome packet via email. This will have everything you need including the PowerPoint presentation, script, evaluation form, sample emails, and link to sign up to the Social Security Maximization software. If you have any further questions once you have reviewed this packet, it will contain the contact information to our SS Program Team.

2. **Q: Do I have to take registrations, make the confirmation calls, or send the confirmation emails for my workshop?**

   A: No. We make all registrations, send all email confirmations, and make all confirmation calls. As host, your only requirement is to show up, deliver the presentation, and meet with attendees afterwards.

3. **Q: Should I visit the venue prior to the workshop?**

   A: Yes, absolutely! Per the Host agreement, all hosts are required to visit the venue at least 24 hours prior to your workshop to ensure that the venue has a working projector, wireless internet, and is accessible for attendees. This is also a good time to get familiar with the venue and your venue contact person.

4. **Q: How do I know who is attending my workshop?**

   A: We will email the attendance list to you on the evening prior to your workshop.

5. **Q: It's the day after my SS workshop, now what?**

   A: The day after your workshop you will need to provide us with a list of all the households that attended. Though they were asked to provide their contact information on the evaluation form at the seminar, we will email you the attendees' contact information that they provided upon registering. You will then send attendees a follow up email inviting them into your office for an appointment to receive their personalized Social Security Analysis. Example follow up emails will be provided in the welcome packet.

6. **Q: How do I pay for this workshop?**

   A: Using the attendance list that you provide, you will be charged to the credit card on file $125.00 per household that actually attended your workshop. If you are sharing the cost with another person, we will need their credit card information as well.

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7. **Q: Does the Registered Rep have to do the speaking?**

   A: No, you are welcome to have a wholesaler or other qualified professional speak at your workshop; however you should still be present. The speaker must use (1) the unmodified SS presentation, or (2) a presentation of your choosing that has been reviewed and approved by us. The presentation must be strictly educational; no investment may be promoted at the workshop.

8. **Q: What if I don't know the answer to somebody's question?**

   A: Don't worry; Social Security is an extremely complex system. Explain to the attendee that you will get the answer for them and follow up after the workshop. If the question pertains to their specific situation, let them know that you have tools and resources at your office that will be utilized during the one on one analysis to answer their question.

9. **Q: What if I run into a technical problem with the projector or laptop during the presentation?**

   A: You should always have a backup plan. If you own a projector, it's a good idea to have it with you as a back up. It is also recommended that you save the presentation on a flash drive, in case of technical issues with your laptop.

10. **Q: What materials should I bring for the workshop?**

    A: The materials that you should come prepared with are; extension cord, pencils, presentation, an extra projector, SS Program booklets & evaluation forms. Refreshments such as cookies, brownies, coffee, soda, etc. are recommended. Other optional items that you may want to bring include: a laser pointer and remote clicker for the PowerPoint.

11. **Q: Will a screen and projector be on site for me?**

    A: Yes, nearly all the rooms booked will have a screen & projector provided; however you might want to bring a backup projector to be prepared. It is also important to know if there is an open outlet that the projector cord reaches.

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12. Q: How early should I arrive for the class?

A: It is suggested that you arrive at the venue at least an hour prior to the workshop. This should give you enough time to set up and tie up any loose ends before attendees start to show up**.** It's not uncommon for attendees to start showing up 30-45 minutes before the workshop begins. Be prepared! This is a great chance to greet attendees and begin building rapport.

13. Q: How do you market?

A: We market through a proprietary mix of social media, email, USPS, and traditional media.

14. Q: What are the attendees expecting from me?

A: Attendees are expecting a friendly and approachable Social Security Program certified presenter. They are expecting to be educated on Social Security claiming strategies, not investments. You are not expected to know everything about Social Security; that is what the SS maximization software is for.

15. Q: Who do I tell them I work for?

A: We encourage you to discuss who you are and what you do for a living when presenting your Social Security Workshop. For example, "I am a financial advisor, and I am looking to grow my practice, but tonight I will only be discussing Social Security." This is an opportunity to let them know that you can help everyone with retirement income planning, IRA's, 401k's etc. However, any conversation about investment planning will occur at your office.

16. Do we discuss disability Social Security?

A: No.

17. Q: What do you do about the people that sign up for the class but don't show up?

A: We inform them of future classes in their area.

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18. Q: How many workshops do you suggest we do?

A: Most areas can support more than 10 workshops per year. The metro Detroit office does 20 different venues/locations 2 times per year, each. The average class size is 25 households and hosts typically hold 2 at the same venue a few days apart.

19. Q: Should we hold the follow up appointment in our office or over the telephone?

A: Although we suggest a face to face meeting with all of the interested attendees, if a phone appointment is more conducive to your schedule and your attendee's schedule, then a phone appointment might be the right choice for you.

20. Q: Will wholesalers pay for all or part of the workshop?

A: A wholesaler may be able to help with part, or all of the payment for the workshop. We do encourage you to reach out to your wholesalers and make them a part of this process. Our partners will accept payment directly from your wholesaler. Do not allow the wholesaler to discuss their company or products. You can do that at your office, but not at the workshop.

21. Q: What if we need to cancel a class last minute?

A: If we cannot find an alternative host, there will be a cancellation fee to cover marketing costs and other variable costs incurred. See the Host Agreement for further details.

22. Q: Do I need an outside business activity approval from my Broker Dealer?

A: Some broker dealers will require an outside business activity approval.

23. Q: Can I get exclusive rights to the area around my office?

A: Not at this time. Therefore, we do not charge any kind of licensing or exclusion fee.

24. Q: Why can't we discuss investments at the workshop?

A: In addition to potential compliance issues, attendees have been informed that this class is strictly educational and is **not** a sales pitch. You are welcome to promote your financial planning practice, but you may not promote any investments at the workshop.