



The Perfect Venue Checklist

For Estate Planning Seminar Success

Use this complimentary checklist from Insurance Marketing Hub to evaluate potential locations, avoid costly mistakes, and simplify your seminar setup from day one.

Location & Demographics

- ☐ Area has high retiree/pre-retiree population
- ☐ Nearby retirement communities or senior centers
- ☐ Target radius matches desired client demographics

Venue Type

- ☐ Library, community center, or educational venue
- ☐ Reinforces a learning-focused, professional atmosphere
- ☐ Accessible for seniors and individuals with mobility needs

Logistics & Setup

- ☐ Adequate seating for expected attendance
- ☐ Comfortable chairs and good acoustics
- ☐ Tables for check-in and materials
- ☐ Working AV equipment (projector/sound)

Accessibility & Parking

- ☐ Ample parking (free preferred)
- ☐ Clearly marked entrance
- ☐ Restrooms nearby
- ☐ Well-lit and safe environment

Availability

- ☐ Consistent dates available for 3–5 event series
- ☐ Preferred times (late morning or early evening)
- ☐ Minimal noise conflicts or overlapping events

Venue Partnership

- ☐ Approved use of venue name in marketing
- ☐ Understanding of venue promotion policies
- ☐ Supportive staff and point of contact confirmed

Saturation Awareness

- ☐ Venue not overused recently for similar events
- ☐ Nearby alternative locations identified for future rotation



Scan the QR code to explore our packages and see how we can help you grow.

Let Us Handle the Heavy Lifting

With our turnkey seminar packages, you get everything you need to fill the room and follow up like a pro — targeted data, multichannel marketing, 24/7 RSVPs, automated confirmations, event reminders, and post-event nurturing through a multi-touch email campaign. You focus on what you do best: building relationships, presenting to qualified prospects, and closing sales.