

SETTING THE STAGE FOR LIVE EVENTS

We understand the commonly held sentiment about live dinner events. We've heard they're expensive, they're unproductive, and they attract guests looking for a free meal without any intention to ever commit to a relationship. The fact is, there's a reason seminars and live events have been around for decades. Advisors who understand the art and science behind a successful live event can set themselves apart and put a personal touch on their marketing strategy.

We specialize in business growth through client acquisition, and we can turn your unseasoned dinner event into a five-star experience for clients and prospects. It's about so much more than making the sale on the first night. It's about building a relationship to be nurtured, and face-to-face connection is one of the best ways to jumpstart that approach. Let's take a quick look at how implementing live and virtual seminars with the best practices and intentions helped our advisor partners. *

Advisor in Covington, Louisiana

Before Live Seminars (2019, Pre-COVID)

\$6 Million in Annuity Premium

\$3 Million in AUM

After Live Seminars (2022, Post-COVID)

\$21 Million in Annuity Premium

\$16 Million in AUM

Advisor in Seattle, Washington

Live Events

Virtual Events

Average Leads Per Event

50 to 60

65

New Client Appointment Rate

≈90%

≈50%

*These case studies and outcomes vary based on many factors such as the marketplace, location and audience demographic. Actual results may vary.

**If you're ready to take the stage and build meaningful personal connections,
give us a call today at 800.440.1088!**

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