

Speaking Engagement FAQs

What audiences are best for your talks?

Professional advisors or nonprofits are my most common audiences, but I also speak to staff, Boards and donors/prospects quite often.

What kind of advanced marketing works best?

- I suggest using the 5-over-5 rule: five emails/contacts each week over five weeks with additional outreach the day before the event.
- Having a host committee also helps significantly and some of the most successful events, in particular with professional advisors, is when the Planned Giving/Development/Professional Advisor Committees forward invitations to their personal contacts.
- Partnering with a local estate planning council, CPA group, fiduciary section of the bar, Financial Planning Association and/or Society of Financial Services Professionals can dramatically increase attendance. Also, many hosts will sponsor one of these meetings, so I speak to their normally-scheduled group and then the host invites additional guests to attend. This can help with registration, location, costs, CE credit approval and just overall administration and expenses. Further still, some sessions will have multiple hosts to achieve the same objective (Planned Giving Council, AFP, multiple community foundations, religious foundations, etc.).

For professional advisors, are some CE credits better than others?

I usually recommend getting CLE credits for attorneys (through the state bar) and CPE credits for accountants (in most every state, these are self-reported and the host just keeps an attendance sheet). I usually discourage CFP (through national CFP Board of Standards) and Insurance CE (state insurance departments) as these kinds of credits are quite easy to get, and frankly, won't be a major draw for the work required. There will always be one or two advisors who will be very happy you did this, but you can take them to a nice lunch instead as it will be less costly and time-intensive. Having said this, most all of my advisor talks have been approved for CFP and insurance. In some cases, my talks are also conducive for CFRE credits as well (usually requires specific learning objectives). But if you get the right attorneys and accountants to attend, kind of like "ladies night," all the insurance, financial advisors and even fundraisers will want to attend as well.

What is the right amount of CE credits and when is it best to have the session?

For advisors, it really depends on local traditions, but normally one hour of CE (50 minutes of presentation time) isn't usually enough to draw people out of their offices. A two-hour session (100 minutes with no breaks) is by far the most popular. And, I have done sessions as long as four hours with a number of breaks - probably painful for everyone!

What is your fee for a half-day or full-day engagement?

- A half-day engagement is usually three hours of actual speaking time is \$7,000 plus expenses and can be structured to any audience(s).
- A full-day engagement is six hours of speaking time \$10,000 plus expenses. Note: any downtime can be used for other questions/training/projects. I just ask for two small breaks during the day and the rest of the time I am happy to help with planned or unplanned projects/ discussions.
- Virtual Presentation Option: Using Zoom, GoToMeeting and GoToWebinar technology or your preferred system, I can provide 1 hour at \$1,500; up to 2 hours at \$2,500 and 3 hours at \$3,000. If you wish to have a customized topic, we can provide a modified fee quote.

Do you require or provide a contract?

Very rarely. Usually, I just document the scope of the project (dates, times, topics, audiences, etc.) by email, and the host provides confirmation of the scope and fees. If contracts are involved, attorneys get involved, and if attorneys get involved, then I am spending more time word-smithing a contract than I would spend doing the project itself. If you aren't happy at the end, just pay me what it was worth to you. Thankfully, this has never happened in more than 2,000 speeches.

When do you bill for the event?

One to two weeks after the event.

Are there any ways to lower the fees/expenses?

Yes, my team of experts can speak on a variety of topics at a lower rate.

Alternatively, the best way to lower my fee is by partnering with another host to split time and/or expenses. So, if two clients want half days on the same day, then I bill for one full day and split the fee and expenses with the two clients. If one client wants a half day the evening before and the other wants the next morning, that usually works as one full day. If I have multiple clients in the same area in the same week, then I split all travel expenses. Some hosts will put the word out to other groups (like community foundations) and then I barnstorm through an area for 3-5 days which can work quite well. Also, some hosts get another group to sponsor my time for particular events or the entire day.

Where can we get event specific materials?

Go to the speaking section of my website, <https://charitablesolutionsllc.com/speaking-engagements/>, and you will find my headshot, speakers bio, all the speaking topics and ideal audiences, outlines, sample PPT slide decks and session descriptions. Even better, you can type my name into Google with the specific topic and other host invitations will pop up. You can use those as templates for your event.

Are you the only speaker at Charitable Solutions, LLC?

While I am usually booked 75-90 days each year, my partners Ryan Raffin, J.D., CAP®; Gary Snerson, J.D.; and Russ Willis, J.D., LL.M., speak frequently as well.

What kind of A/V do you require?

I need a projector, screen and wireless mic, lavalier or wired mic with a lot of cord (I like to wander). Unfortunately, podiums and I don't work well together.