The background is a dark blue gradient with faint architectural drawings. In the top left, there's a floor plan with labels like 'RECEPTION', 'LIVING', and 'KITCHEN'. In the top right, there's an isometric perspective drawing of a building. In the bottom left, another floor plan is visible with labels like 'CENTRAL HALL' and 'RECEPTION'. In the bottom right, there are two architectural elevations of a building. A compass rose is located in the top center.

How to Host an Insurance Educational Event

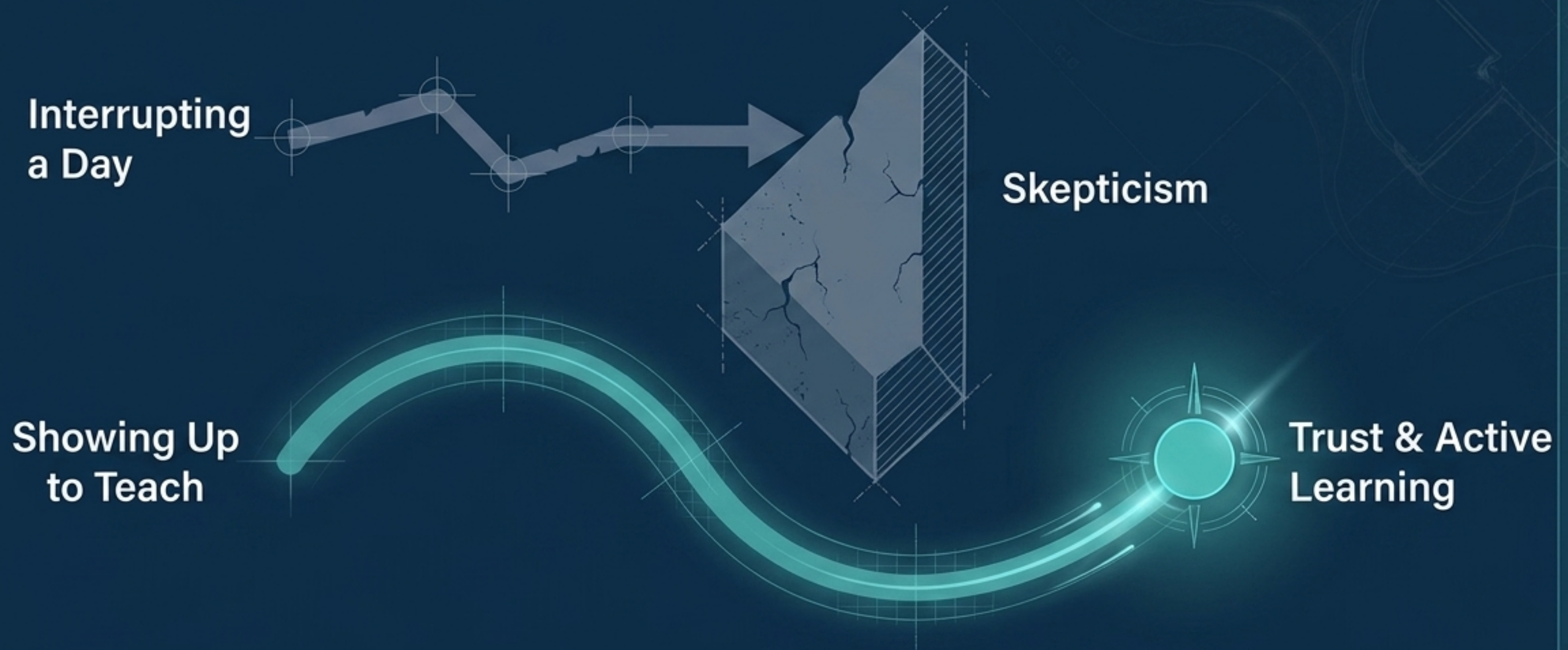
Cold outreach eventually stops scaling

The Pipeline Plateau



The 1-to-Many Shift

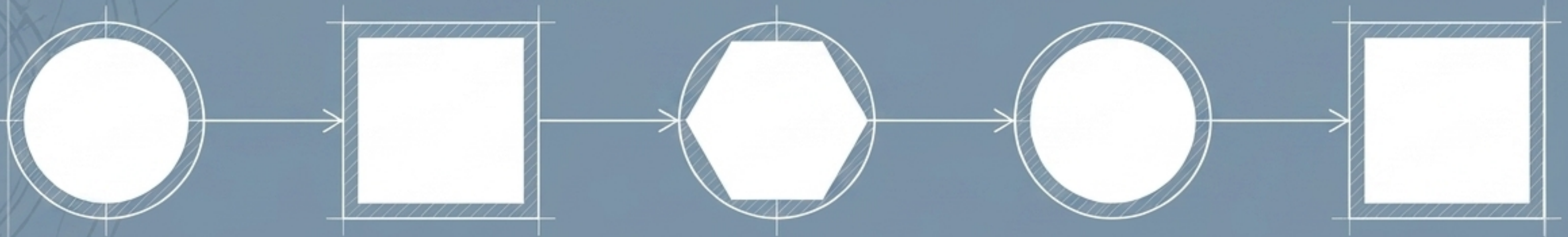
Showing up to teach bypasses skepticism



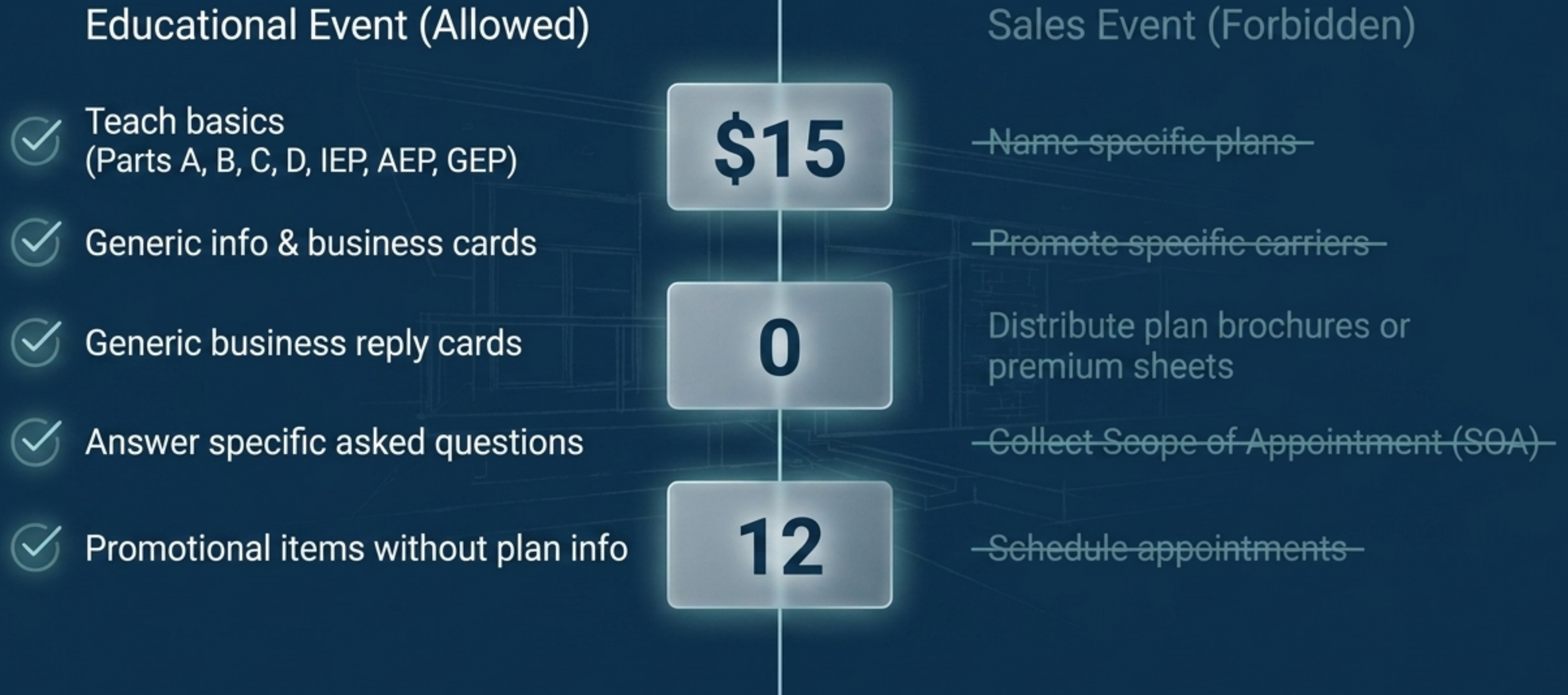
Generates more referrals per client and lowers paid lead costs over time.

A reliable process prevents empty rooms

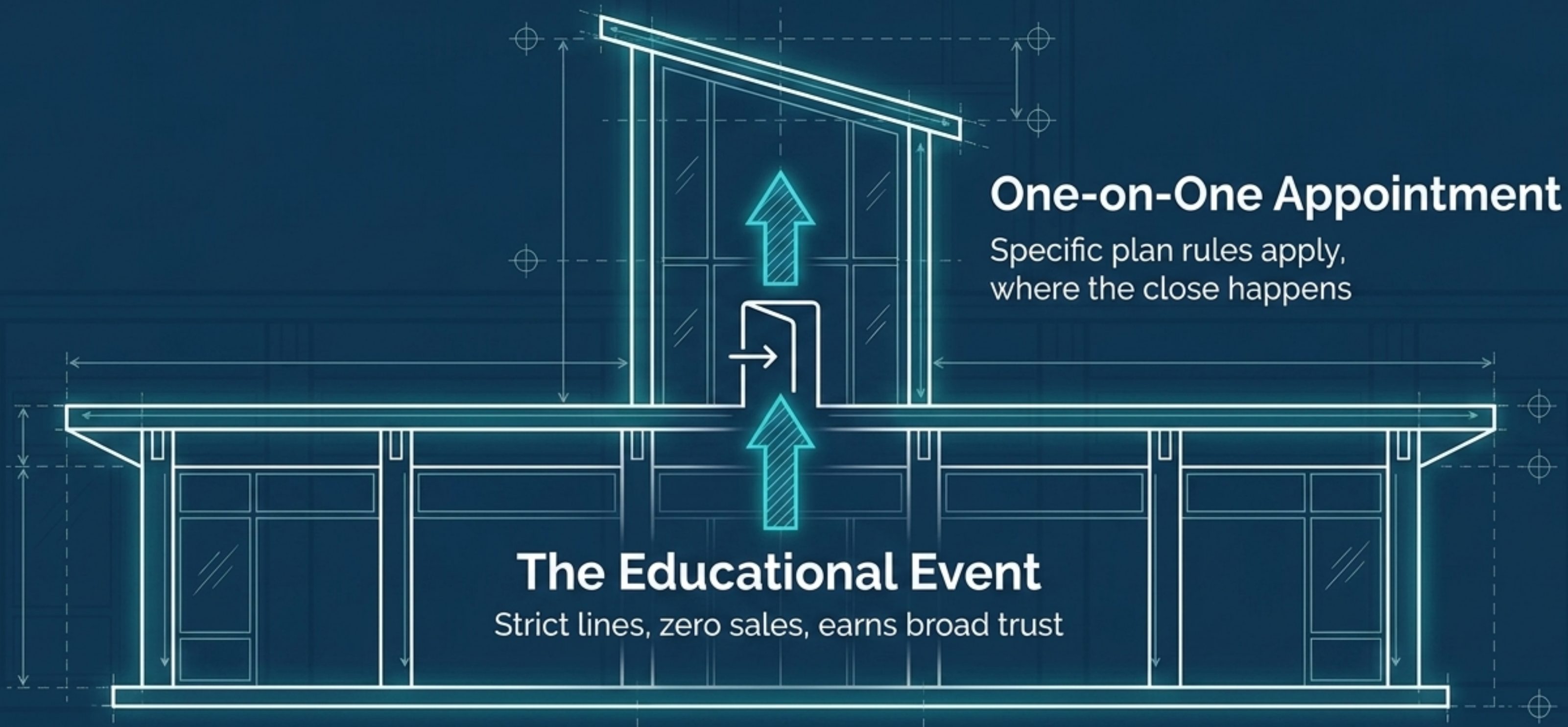
The fix isn't a better script. It's a five-step framework that stops bad outcomes before they happen.



The CMS boundary line requires absolute compliance



The educational event is the front door

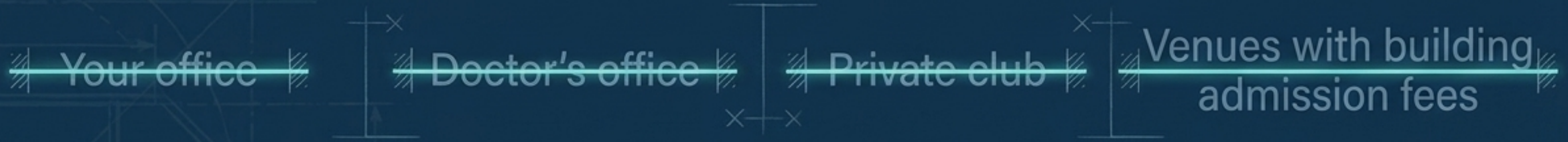
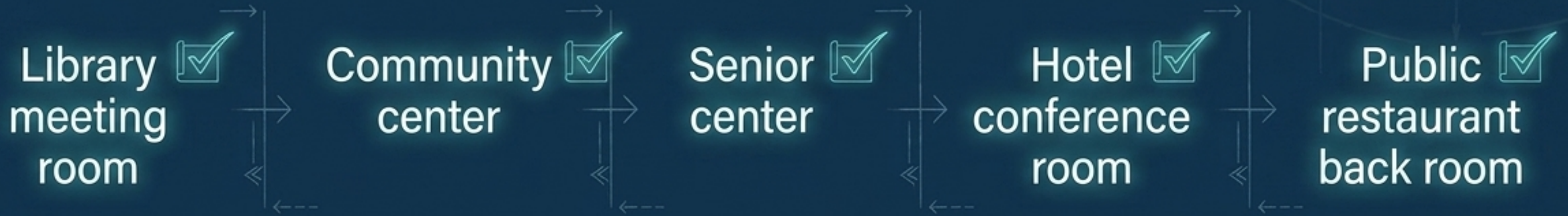


Five phases to build a compliant event





Step One requires a truly public foundation





Promotion

Step Two layers the promotion stack

Local flyers, newsletters,
church bulletins, press

Personal calls to
ten existing clients

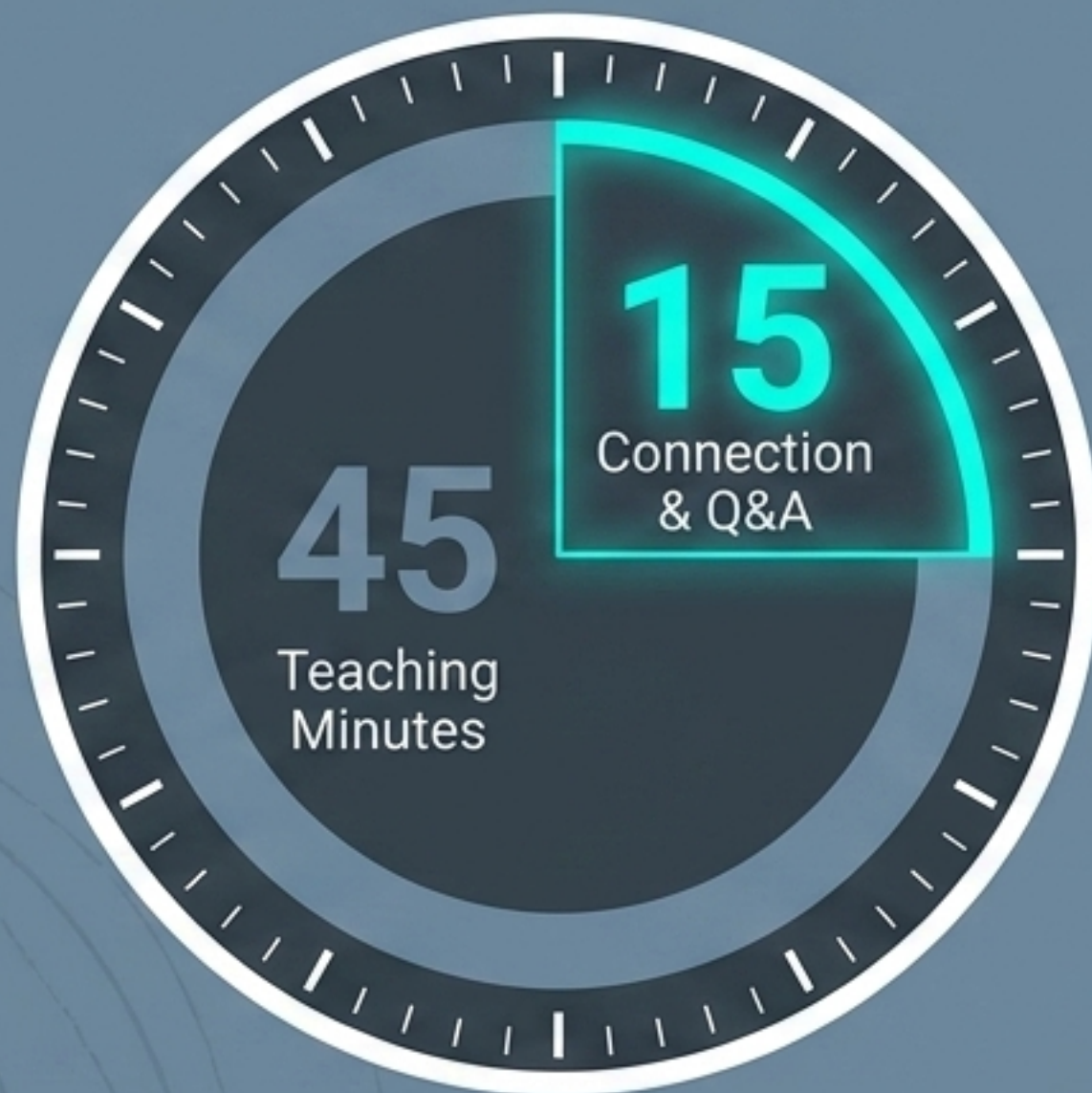
Direct mail to
targeted age list

1200

Every invite must include "Educational," special-needs accommodations with TTY, and the strict no-plan-specific-information disclaimer. Run 3 weeks out, second touch 1 week out.

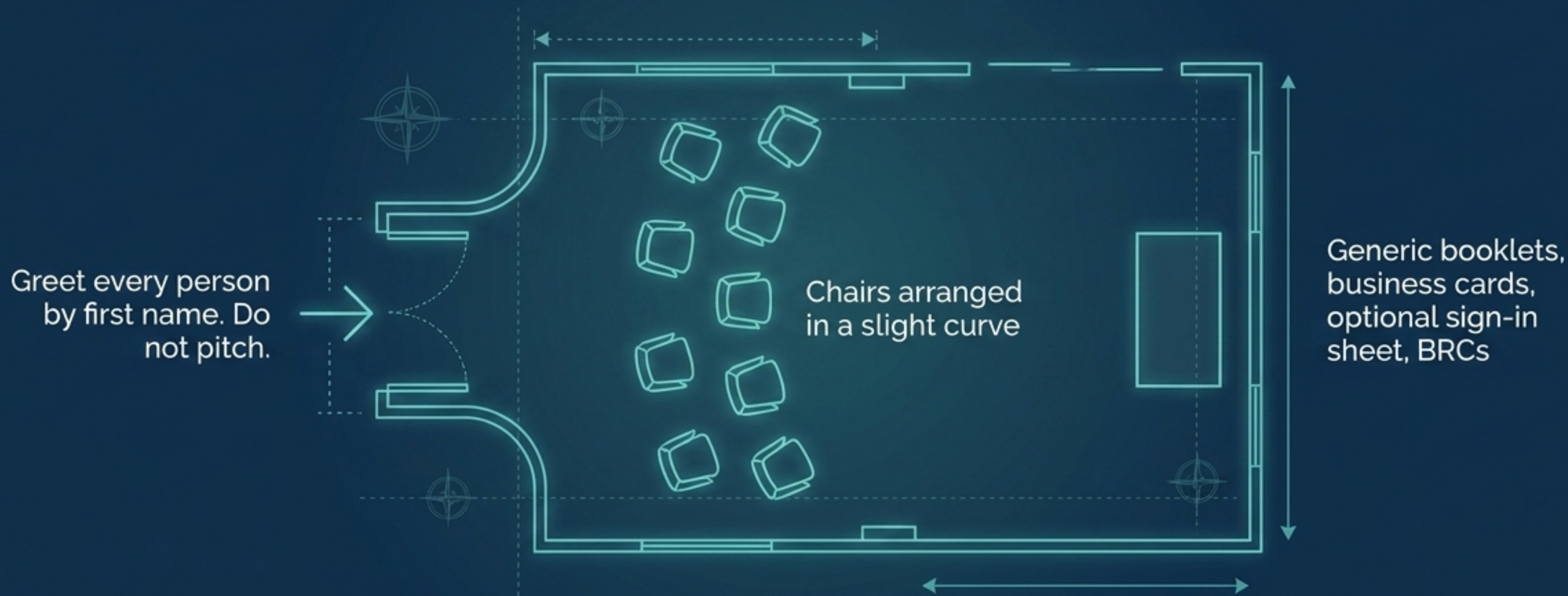


Step Three divides the hour into teaching and connection



That's a great question, and exactly what we cover in a personal appointment. I'll leave my card to set one up.

Step Four engineers the physical room flow



Step Five maps the strict permission tree

Event Attendees

No written permission

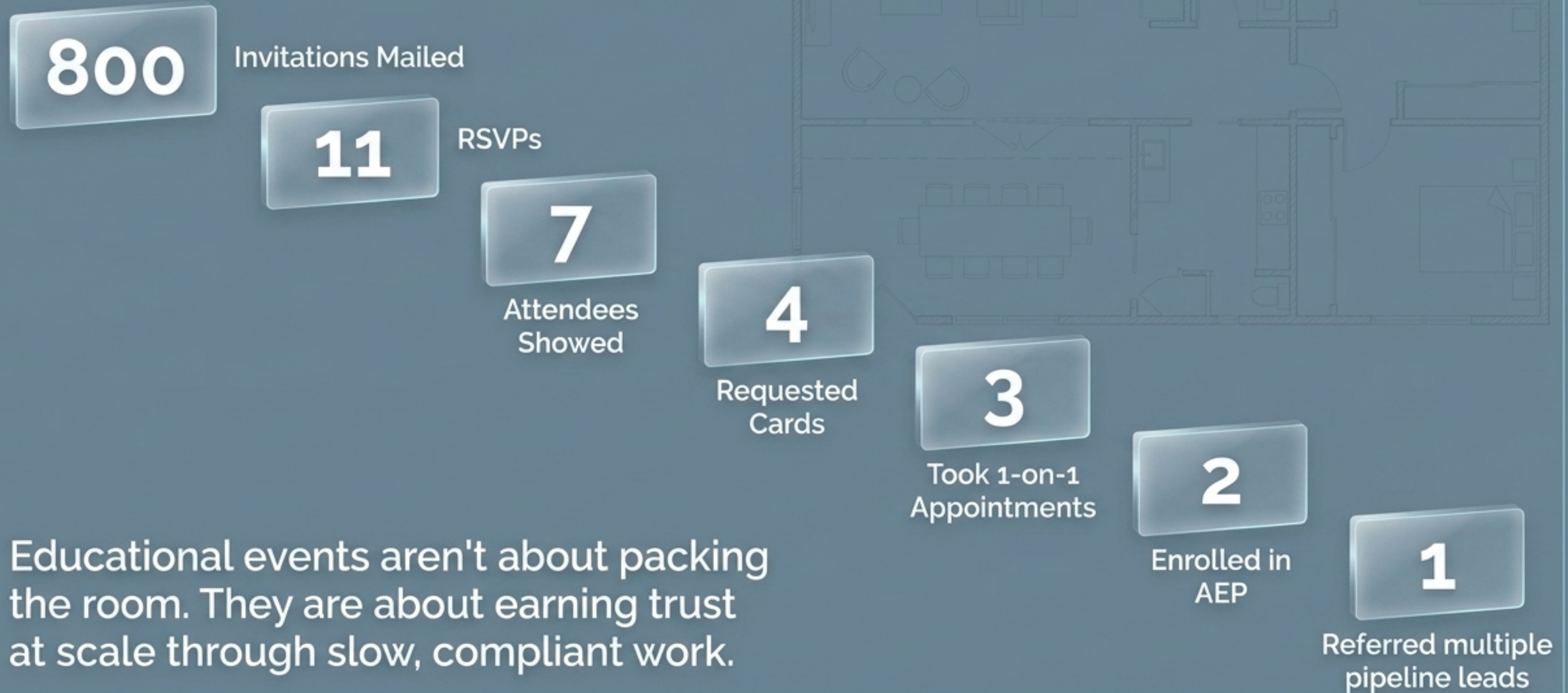
Cannot Call

Picked up BRC
Took card & reached out
Signed optional sheet

48

Compliant Follow-Up

Consistent execution proves the long-term math



Action Step: Reserve your compliant ground

- ✓ Pick a date exactly sixty days out.
- ✓ Reserve a free public meeting room (library or community center).
- ✓ Write the four mandatory compliance bullets for your invite.
- ✓ Start building your targeted mailing list this week.



The first event is the hardest. The second is half the work. The third is a system.