

The All-Star Tax Series

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Simple Tips: Hosting an All-Star Tax Series Broadcast

Hosting a broadcast of The All-Star Tax Series can be a good way for you to network on a monthly basis with CPAs, Enrolled Agents, attorneys and other professionals in your community. Here are some important steps and helpful tips to make the experience a great one.

Hosting Steps:

1. Before the course:

- Remind professionals who have registered to attend.
- Download and print any desired course materials.
- Check your video equipment and requirements for watching a broadcast.

2. The day of the course:

- Download your pre-populated attendance sheet so it will include any last-minute registrations.
- Deliver the broadcast according to the instructions on the JonesLink page *Hosting (CPE) Professional Broadcasts "All Star Tax Series" - New Process*.
- Offer to follow up to see if your guests have any clients who would benefit from the information in the program or a general financial consultation.

3. 1-2 days after the course:

- Scan attendance sheets so participants receive CPE/CLE credit.
- Send follow-up letters to attendees and anyone who missed the course.
- Call professionals and offer to set up appointments with them or their clients.

Key Tips to Remember When Hosting:

- FAs: Look at the materials ahead of time so you can address items relevant to professionals and clients.
- BOAs: Provide lunch, beverages and/or snacks, and office supplies such as pens and notepads. Submit refreshment receipts for reimbursement. (Refer to WEB158355 for more details.)
- FAs: Ask professionals what they thought about the program content during breaks and after the broadcast. Was it useful? How will the content affect your mutual clients?
- BOAs: Send course materials and information on webinar replays to those who missed the broadcast.
- FAs and BOAs: Cultivate relationships between broadcasts to build long-term trust and rapport, ultimately positioning your branch to get the referrals or introductions you want.

Using these hints can help make your All-Star Tax Series event a success and improve your professional networking. For more information, consult JonesLink and www.allstartax.com/fa.

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