



# EXCEPTIONAL EVENT CHECKLIST

In order to ensure your event is exceptional, please complete this checklist as early as possible prior to your event.

**Date of Event** \_\_\_\_\_

**Branch Budget** \_\_\_\_\_

**Time of Event** \_\_\_\_\_

**Loan Officer Budget** \_\_\_\_\_

**Project Coordinator(s)**

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Email: \_\_\_\_\_

**Loan officers on the project and role in preparation and day of event:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Marketing Needs:**

- Flyers
- Tents
- Table covers

- Pop up banners
- Feather flags
- Promotional items

- Social media filters
- Photography\*
- Video\*

**How far in advance is this request being made (recommended lead time is at least 2 weeks)?**

\_\_\_\_\_

**Who's invited to the event?**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Is it going to be cobranded?**  Yes  No

**What items need to be accomplished prior:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Do we have future planning meetings set up?**  Yes  No

**Plans to promote prior to the event:**

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**\*Photographers and videographers MUST be requested with as much advance notice as possible.** The closer to your event the less likely they will be able to attend. Attendance is based on availability of the team members, and dates are often requested several weeks or months in advance.