**Instructions for Seminar Kit Usage & Submission to Compliance:**

*Note: You can preview the content of the presentations by clicking on the thumbnail images at the top of each kit description.   
 It will open a link to a pdf.*

1. **PREPARING YOUR PRESENTATION** 
   * We are happy to format this for you with your contact information, photo and DBA logo. We can also share the art file for those with advisors who have marketing staff available to help. If you need assistance contact FRG marketing ([marketing@lplatfrg.com](mailto:marketing@lplatfrg.com)) and provide the EXACT NAME for the seminar kit you are using.
2. **PREPARING YOUR FLYER INVITATION**

* A format of the invitation is available in a flyer format. This format can be used as a handout or as a landing page to advertise the event on your website. We are happy to format this for you with your contact information, photo and DBA logo. We can also share the art file for those with advisors who have marketing staff available to help. If you need assistance contact FRG marketing ([marketing@lplatfrg.com](mailto:marketing@lplatfrg.com)) and provide the EXACT NAME for the seminar kit you are using.

1. **PREPARING YOUR EMAIL INVITATION**

* You can copy and paste directly from the Word document into the body of your approved emailing tool and customize where applicable.

1. **SUBMISSION TO COMPLIANCE**
   * Once your kit is personalized you will need to submit the kit as **“Preapproved”** into the Advertising Review Tool (ART) for record retention purposes. Refer to the tracking number assigned to the project name on the Website.
   * Upload all of the components you have chosen to use for your seminar event and include the event date(s):
     + - **PowerPoint with your disclosure added**
       - **Flyer Invite with details added**
       - **Email Invite with details added**
       - **Our Family Legacy Keepsake**
       - **List of Invitees (Note: after the event you MUST ADD a final attendee List to the “preapproved” project that was submitted into ART for record retention**