**Instructions For Seminar Kit Usage & Submission To Compliance:**

1. **NOTE: These templates are NOT approved “As Is” for Hybrid RIA advisors. Please contact FRG marketing (**[**marketing@lplatfrg.com**](mailto:marketing@lplatfrg.com)**) for assistance to create a Hybrid RIA version of the seminar kit or it you have any other questions about the content.**
2. **ALL Templates Need Appropriate Disclosures Added to page two. You can use the disclosure language that is used on your approved email signature. (NOTE: IS advisors must also use the boxed disclosure).**
3. 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.
4. **PREPARING YOUR PRESENTATION** 
   * **NOTE: You can only use the Allianz Logo on the presentations.**
   * **NOTE:** The content of the presentation is preapproved and **cannot** be edited except for the following:
     1. **Add name, title, DBA to first slide**
     2. **Add the required disclosure verbiage to page two**
5. **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. **SUBMISSION TO COMPLIANCE**
   * Once your kit is personalized you will need to submit the kit as **“Preapproved”** for record retention. 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 to CMAX and include the event date(s):
     + - **PowerPoint with your disclosure added**
       - **Workbook with correct disclosure added**
       - **Flyer Invite with details added**
       - **List of Invitees (Note: after the event you MUST ADD a final attendee List to the “preapproved” project that was submitted to CMAX for record retention**