

Seminar results – Year 1 – Behind the numbers

	Attendees	Attendee Meetings	Clients	No Shows	No Show Meetings	Clients	Marketing Cost	Misc Cost	Total Cost	Planning/ Insurance	AUM	Annual AUM fee	First Year Revenue	Five Year Revenue
October 2023	25	11	1	18	1	1	\$ 8,000	\$ 2,100	\$ 10,100	\$ 6,000	\$ 1,800,000	\$ 16,000	\$ 22,000	\$79,101
January 2024	44	12	1	20	-	-	12,400	1,125	13,525	16,500	1,050,000	10,500	27,000	\$64,106
April 2024	24	5	2	12	1	1	8,000	1,050	9,050	3,000	5,100,000	45,810	48,810	\$212,709
July 2024	37	13	4	12	-	-	9,600	100	9,700	22,500	2,650,000	27,825	50,325	\$149,275
Sept 2024	20	8	2	8	-	-	5,000	1,500	6,500	1,500	1,360,000	14,900	16,400	\$69,694
Oct 2024	27	9	1	12	-	-	9,000	500	9,500	1,500	500,000	5,000	6,500	\$24,355
	177	58	11	82	2	2	\$ 52,000	\$ 6,375	\$ 58,375	\$ 51,000	\$ 12,460,000	\$ 120,035	\$ 171,035	\$ 599,240

Misc costs include: refreshments, printing, folder, pens, software

One time costs include: sign, projector, Horseshmouth presentation, spare laptop, speakers, headset

293%1st year ROI Firm

1027%Five year ROI Firm