

## Event ideas for financial advisors

Fun, engaging and informative events offer a great way to capture the attention and loyalty of clients and prospects alike. Consider these event ideas when planning your calendar.

### Give them insights with impact

*How-tos and timely discussions make for good events. Address specific questions and needs that your target clients have. These can be webinars or in-person events.*

**Elections and the markets.** Provide investors with historical perspective on how markets behaved during major election years.

**Healthier habits.** Partner with dietitians and personal trainers to address the latest diet and exercise fads. (To find a partner, professional organizations like the Academy of Nutrition and Dietetics have online databases.)

**Staying safe online.** Partner with a cybersecurity expert. Have attendees bring their devices and leave with steps to protect their sensitive, personal information.

### Build multigenerational connections

*These events can help you form relationships with clients' kids and lead to discussions about college savings, budgeting and financial literacy for children, wealth transfer, estate planning and more.*

**Explore your family tree.** Partner with an ancestry company to test and produce reports for attendees before the event. At the event, give attendees their reports and have a presentation from your partner about how to read them. Provide group discussion questions and a large world map on the wall where people can trace their families' origins so that attendees can share their stories and see how they might intersect with others'.

**College application workshop.** Host a workshop with college admissions officers (find one through a local university or the National Association for College Admission Counseling) to talk with parents and teens.

**Connecting with young kids.** What are the most popular books, games, shows, songs and toys for little ones? Host a show-and-tell with librarians or teachers at a local library or school.

**Planning family vacations.** Partner with a travel agent to help attendees plan the perfect vacation. Bring a flight attendant to show how to pack optimally.

### Give them an upper hand on aging

*Help people start important conversations, whether they're caring for aging parents or facing their own retirement.*

**The latest in longevity.** Put on a panel with scientists, physicians and other experts to share about new developments in aging research and brain health. Consider partnering with the Alzheimer's Association or a local hospital or university.

**Social Security.** Educate attendees about how Social Security works, factors to consider when determining when to start distributions or how much to take, and how it fits into the larger retirement planning picture.

**Sustainable exercise.** Partner with physical therapists (the American Physical Therapy Association has a database) who specialize in older populations to teach attendees how to stay active as they age.

## Foster community involvement

*Events with a local angle demonstrate your expertise in your market and help clients and prospects meet others in their area. Events involving nonprofits can also lead to conversations about tax-advantaged philanthropy.*

**Local issues.** Partner with local government officials to talk about issues that have tax, real estate and other financial and business implications. Help attendees plan accordingly based on recent or upcoming changes.

**Philanthropy fair.** Host a lineup with nonprofits/charities presenting their causes (find with Charity Navigator, GreatNonprofits or GuideStar). Look at attendees' affinities or poll them for the ones they want to see the most.

**Volunteering days.** Partner with a charity that matches with the affinities of invitees or was voted for in a poll. Put on a hands-on volunteering event.

## Support business owners

*These events can help you build centers of influence (COIs), allow attendees to build partnerships with other business owners and lead to conversations about corporate retirement plans.*

**Branding workshop.** Partner with a branding or graphic design expert to teach about creating a brand kit for a business, complete with color palettes, fonts and logos.

**Hiring young talent.** Engage schools, HR experts and recruiters to teach businesses how to find the best employees in the area. Consider partnering with organizations that put on job fairs and networking events.

**Wealth management for business owners.** Partner with CPAs, lawyers and other business planning COIs to cover key wealth planning topics including tax, tips to shield assets from creditors, retirement and succession.

## Just for fun

*The only limit is your imagination! And budget, of course.*

**Antiques roadshow.** Heirlooms carry memories, but they may hold even more value. Partner with an appraiser to assess attendees' treasures. (To find one, use the International Society of Appraisers or auction houses.)

**Green thumb.** Partner with a floral shop. Put on a workshop where attendees learn how to arrange flowers, grow their own gardens and/or place and care for houseplants in their homes.

**Music class.** Invite a local music teacher to teach the basics of playing an instrument. Host at a music shop or school and have instruments available for attendees.

**Photoshoot.** Partner with a photographer to offer a photoshoot for new professional headshots or family photos (especially during holiday season).

**Self-defense class.** Create a safe space for people to learn about how to protect themselves. Partner with self-defense experts to hold a class. Link to topics of risk and personal growth and goals.

**Art gallery gala.** Sponsor a show at a nearby art exhibit, supporting a favorite community artist or theme.



### Need help coming up with an event idea or bringing one to life?

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