

Solari Meet & Greet: Instructions for Hosts

If you would like to host a Solari Meet & Greet with Catherine and Solari Report subscribers during Catherine's Financial Transaction Freedom Tour, we ask that you follow these steps. As host, you are responsible for organizing, conducting, and overseeing the event.

1. Planning your Meet & Greet

Before contacting Solari Customer Service, you should decide on the following:

- A proposed date and time for the Meet & Greet.
- A proposed venue that meets the Solari guidelines (see *What type of venue should I choose?*).

2. How Solari Customer Service will help

Once you have decided on a proposed date, time, and venue, please contact Solari Customer Service. We will assist you to organize the Meet & Greet in the following ways:

- Identify subscribers in and around your area.
- Help you develop an *announcement email* which lists the date, time, venue, and your name and contact details, and asks recipients to contact you directly if they wish to attend the event.
- Send the announcement email to the selected subscribers.

Note: Solari does not disclose subscriber information to the host. Instead we will let you know the approximate number of subscribers who will receive the announcement email.

If you are a member of Solari Connect (connect.solari.com), you are welcome to promote the Meet & Greet to subscribers on that platform by posting the following information:

- Date and time of the Meet & Greet.
- As the host, your name, email, and an optional phone number (if you wish to share this).

Note: Subscribers may bring as a guest one close family member, such as a spouse or adult child, who would be interested in and comfortable with the open conversations that Solari subscribers enjoy.

3. Compiling and verifying the list of attendees

As the host, you are responsible for keeping an ongoing list of subscribers who contact you in response to the announcement email or the post on Solari Connect, and express an interest in attending the event.

This list of subscribers (and any guest they wish to bring) must be sent to Solari Customer Service to review and verify that persons on the list are subscribers. Customer Service will assist you to finalize the list of expected attendees prior to the event.

4. Your duties as host on the day of the Meet & Greet

On the day of the event, please ensure that the individuals who arrive are on the list and are subscribers (or the subscriber's guest).

Among the subscribers planning to attend, identify one or two volunteers willing to help with check-in and other tasks. For example, Solari Report hard-copy *Wrap Ups* and Solari caps may be available for sale at some Meet & Greet (with proceeds supporting Catherine's work with state legislators). Please ensure that a volunteer is available to assist with these sales.

Photos can be taken after the event. *Permission of attendees must be given to take photos.* We may request that you or someone else at the Meet & Greet take photos. If the group has consented to photos being taken and shared with Solari, you can send a selection to Solari Customer Service for our review and possible use on the Solari website.

Solari Meet & Greet FAQ

What type of venue should I choose?

Select a closed or private location for the event. This means either a dedicated venue or a private room (if in a larger venue). Please avoid noisy venues such as bars. If you meet in a restaurant, the Meet & Greet should take place in a private room. For large groups, hosts should ensure availability of a microphone or other audiovisual equipment as needed.

How do I handle Meet & Greet costs?

You are responsible for ensuring that any costs incurred are covered (for example, snack or meal costs). When applicable, the event should also cover meal costs for Catherine and any Solari colleagues who attend. *Solari will not cover any event costs or handle any proceeds.*

Options to cover costs include the following:

- Recoup costs by charging attendees a suggested donation or entrance fee after calculating the cost per person. (Some hosts may instead choose to donate the cost of the event themselves.)
- Alternatively, you are welcome to arrange a potluck or a bring-your-own-food type of event.

Some hosts also raise additional funds to pay for Catherine's travel costs. This is not required but is very much appreciated.

What are Solari's event policies?

Hosts should inform attendees *in advance of the event and at the event* of the following policies:

- **NO DEVICES:** Phones, tablets, smart watches, fitbits, and any other recording or communication devices must be left at home or in the attendee's car. The goal is to achieve an intimate atmosphere where attendees can speak freely.
- **GUESTS:** Subscribers may bring one close family member, such as a spouse or adult child, who would be interested in and comfortable with the open conversations that Solari subscribers enjoy.
- **PRIVACY:** Please respect the privacy of the other subscribers and guests in attendance. Do not quote them outside of the event without their permission (Chatham House Rule).
- **STAYING IN TOUCH:** For attendees who have given permission, hosts may collect email addresses and share them with the rest of the group. Subscribers who are on Solari Connect can also stay in touch by forming a local Connect group.

Where can I see the Meet & Greet schedule?

The Meet & Greet schedule is available on the Solari Report website, and will include contact information for each event's host.

If you have any questions, please contact customerservice@solari.com.