

The Ultimate Guide to

# Financial Services Event Management



# What's inside?

The Essentials to a Successful Financial Services Event.....	4
Meet Security and Compliance Standards.....	5
Integrate with Your Native Marketing Stack.....	6
Secure Your Venue.....	7
Ensure Brand Continuity.....	8
Enable Seamless Registration.....	9
Encourage Attendee Networking.....	10
Utilize A Mobile App.....	11
Gain Powerful Event Data and Analysis.....	12
Upgrade Your Technology to Match Your Services.....	13

# Introduction

Events held in the financial realm all revolve around one thing: security. And if you invest your money in a financial organization, you're probably thankful for that. But when it comes to planning, marketing, and executing an event at any scale, security and compliance can get in the way of your event's visibility.

More than that, sticking to manual processes to ensure event security protocol tends to be a time-wasting, draining task and allows for human error and miscommunication to mishandle your brand.

What if there was a better, secure, and compliant way to handle your event management? What if you could (metaphorically) throw away the Excel spreadsheets, clone your events, and keep your branding uniform now and forever?

Using the power of one platform to plan, host, and analyze your event securely will enable automation, brand continuity, valuable event analytics, and more to make sure your attendees have a secure and memorable experience time after time.



# Upgrade your Technology to Match Your Services

Your organization's financial services are top of the line and you know it. But does your technology do everything you need it to or are you stuck in manual processes? While your current tools work, the power of one event management platform is ready to exceed your expectations.

Create a seamless experience for your customers with a fully integrated platform from ideation to completion. By taking a proactive approach to security and compliance, branding, automation, data reporting, and more, not only will your event and attendees thrive, but you and your staff will save valuable time and resources.

MeetingPlay + Aventri's event management system helps you simplify event planning for virtual, hybrid, and in-person events. It has the power and security large financial organizations need and the scalability that event organizers love.

Interested in MeetingPlay + Aventri for your event management needs?

[Schedule a Demo](#)

