



PLANNING GUIDE CHECKLIST

ACTIVITY TITLE:

DATE:

#CREDITS

APPLICATION/PLANNING DOCUMENTS:

COMPLETED APPLICATION

COMPLETED DISCLOSURES FOR ALL PARTIES

Planning Committee

Administration Officers

Speakers

APPLICATION FEE

PRE-MEETING

PROPOSED AGENDA

SPEAKER LIST

PLANNERS

DRAFT OF ALL MEETING MATERIALS (Save the Date, Brochures, Program, etc.)

POST MEETING:

SUBMISSION OF TIMED FINAL AGENDA

FINAL MEETING MATERIALS

FINAL ATTENDEE LIST

must be legible, include name, dob (mm/dd), License # and State, credits earned

SUMMARIZED ATTENDEE EVALUATION FORM

Must provide ONE report summarizing all attendee evaluations

SUBMISSION OF FINAL ACTIVITY BUDGET WORKSHEET

PAID FINAL BALANCE: