



EVENT PLANNING TOOLKIT

GP Event Preparation Template

Align the story. Qualify LP fit. Advance the next action.

EVENT NAME

DATE(S)

LOCATION

FIRM / FUND

ATTENDEE(S)

01 Fundraising brief

VEHICLE / VINTAGE

TARGET FUND SIZE

CURRENT COMMITMENTS

TARGET CLOSE

PRIMARY EVENT OBJECTIVE

TARGET LP PROFILE

02 Meeting narrative

WHY THIS STRATEGY, WHY NOW?

DIFFERENTIATION

EVIDENCE TO LEAD WITH

EXPECTED OBJECTIONS



EVENT PLANNING TOOLKIT

GP LP Meeting Planner

03 LP meeting records

LP record 1

LP NAME	INSTITUTION	ROLE
CONTACT DETAILS	CHECK-SIZE RANGE	MEETING STATUS
STRATEGY FIT	MEETING NOTES	FOLLOW-UP

LP record 2

LP NAME	INSTITUTION	ROLE
CONTACT DETAILS	CHECK-SIZE RANGE	MEETING STATUS
STRATEGY FIT	MEETING NOTES	FOLLOW-UP

LP record 3

LP NAME	INSTITUTION	ROLE
CONTACT DETAILS	CHECK-SIZE RANGE	MEETING STATUS
STRATEGY FIT	MEETING NOTES	FOLLOW-UP



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GP LP Meeting Planner

03 LP meeting records (continued)

LP record 4

LP NAME	INSTITUTION	ROLE
CONTACT DETAILS	CHECK-SIZE RANGE	MEETING STATUS
STRATEGY FIT	MEETING NOTES	FOLLOW-UP

LP record 5

LP NAME	INSTITUTION	ROLE
CONTACT DETAILS	CHECK-SIZE RANGE	MEETING STATUS
STRATEGY FIT	MEETING NOTES	FOLLOW-UP

LP record 6

LP NAME	INSTITUTION	ROLE
CONTACT DETAILS	CHECK-SIZE RANGE	MEETING STATUS
STRATEGY FIT	MEETING NOTES	FOLLOW-UP



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GP Follow-up

04 Post-event follow-up

LP / INSTITUTION	FOLLOW-UP	OWNER	DUE DATE	STATUS