

LCE SIP & PREP

Host Toolkit & Resource Guide

Guided by the A.P.T.™ Method — Anticipate • Prepare • Transition

Legacy Consulting and Events, L.L.C.

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LegacyConsultingEvents.com

A Note from Kelli

Thank you for choosing to bring the LCE Sip & Prep experience to your community. This is one of the most generous things you can do for the people in your life — creating a calm, guided space for them to begin getting their important information in order.

This toolkit is designed to make the process simple and stress-free for you. From selecting your topics to scheduling your date, collecting payment, and inviting your guests — everything you need is right here.

You've got this. And I'll be right there with you when the day comes.

With gratitude,

Kelli Edwards | Legacy Consulting and Events, L.L.C.

How It Works (The Big Picture)

The Sip & Prep is a relaxed, guided gathering where participants begin organizing vital information using the A.P.T.™ Method. It's not about finishing everything — it's about starting with clarity.

As the host, you will choose 5 topics from the full LCE topic menu (see Step 1) based on your guests and the goals you have for your gathering. Each topic is drawn from the same framework used across LCE's Ladies events, Couples events, and the A.P.T.™ Essentials Guidebook.

Every guest receives a printed Sip & Prep workbook and leaves with simple, actionable next steps.

Investment & Payment Details

Item	Details
Per person (workbook included)	\$25.00
Shared Household Rate (2 immediate family members)	\$45.00 total
Minimum guests required	8 people
Booking deposit (applied to your balance)	\$100.00
Remaining balance due 7 days before	Balance owed after deposit is applied
Example — 8 individual guests	Total: \$200 • Deposit: \$100 • Balance due: \$100
Example — 4 Shared Household pairs (8 people)	Total: \$180 • Deposit: \$100 • Balance due: \$80
Additional guests (above confirmed count)	Settled at the close of the event

What Is the Shared Household Rate?

The Shared Household Rate (\$45 for two people) is available for two members of the same immediate family attending together — spouse, sibling, or a parent/adult child. Not intended for roommates or unrelated guests.

How to Pay LCE — All Payments via Zelle

Zelle: legacyconsultingandevents@gmail.com

Step 1 — Submit your \$100 deposit to reserve your date.

This deposit is non-refundable and is applied toward your total balance.

Step 2 — Pay your remaining balance 7 days before your event.

(Total guest cost minus the \$100 already paid.)

Step 3 — Any guests above your confirmed count are settled at event close.

Please include your event date in the Zelle memo.

How you collect payment from your guests is entirely your choice — cash, Venmo, Zelle, or any method that works for your group. Just ensure your host total reaches LCE by the deadlines above.

Your Step-by-Step Hosting Plan

Step 1 — Request Your Date & Select Your 5 Topics

1. Email legacyconsultingandevents@gmail.com with your name, 2–3 preferred dates, approximate guest count, and city/location.
2. Kelli will confirm availability and respond within 48 hours.
3. Once your date is confirmed, review the Topic Menu below and choose the 5 topics that best fit your guests and goals for the gathering.
4. Share your 5 selected topics with Kelli when you submit your deposit so your workbooks are prepared accordingly.
5. Submit your \$100 deposit via Zelle to hold your date: legacyconsultingandevents@gmail.com

Your 5 topics will be reflected in your guests' workbooks and in the invitation wording you share. See the Topic Menu below.

Topic Menu — Choose Any 5

The topics below represent the full range covered across LCE's Sip & Prep events. Select the 5 that best serve your guests and the goals of your gathering. There is no wrong combination.

✓	Topic	What Your Guests Will Explore
☐	Medical Essentials	Key health information, conditions, providers, medications, and insurance that others may need in an emergency.
☐	Financial Overview	Clarity around accounts, assets, obligations, and financial contacts — the basics that support every transition.
☐	Vehicles & Transportation	Ownership, insurance, financing, and access details for all vehicles — reducing confusion at the worst times.
☐	Residences & Property	Where you live, who has access, lease or mortgage details, and what supports life there.
☐	Utilities & Home Services	The services that keep life running — providers, accounts, and who to contact when life shifts.
☐	Emergency Contacts	The right people, reachable quickly — family, medical, legal, and personal contacts organized in one place.
☐	Storage — Lock Box & Notebooks	Where vital documents and physical records are stored, and who has access when it matters.
☐	Security, Access & Valuables	Passwords, PINs, safe combinations, and the location of what matters most.
☐	Charities & Giving	Ongoing commitments, donor accounts, and generosity records — honoring values even during transition.
☐	Funeral & Celebration of Life Wishes	A gift of clarity to loved ones — reducing guesswork and honoring your voice during the hardest moments.
☐	Final Desires	Personal wishes, messages, and legacy intentions beyond formal legal documents.

☐	Core Values	What matters most to you — the foundation that guides every preparation decision and legacy choice.
☐	Accountability	A personalized plan to follow through — because starting is only the beginning.

Your 5 Selected Topics (fill in before sharing with guests)	
1.	_____
2.	_____
3.	_____
4.	_____
5.	_____
Share this list with Kelli along with your deposit to confirm your workbook content.	

Step 2 — Invite Your Guests (3–4 Weeks Out)

6. Use the invitation templates in this guide (digital flyer, email, or text — your choice).
7. Remember to include your 5 selected topics in your invitations so guests know what to expect.
8. Share to your personal social media (Facebook, Instagram) or send directly.
9. Aim to invite 12–15 people to comfortably secure your minimum of 8 confirmed.
10. Set a clear RSVP deadline — at least 10 days before the event.

Step 3 — Confirm Guest Count & Pay Balance (7 Days Out)

11. Finalize your confirmed attendee list.
12. Calculate your remaining balance: total guest cost (individual guests × \$25, plus any Shared Household pairs × \$45) minus your \$100 deposit.
13. Send your balance to LCE via Zelle: legacyconsultingandevents@gmail.com
14. Share the event address with Kelli if you haven't already.
15. Send a reminder to all confirmed guests (template included below).

Step 4 — Prepare Your Space (1–2 Days Before)

16. Set up comfortable seating for all confirmed guests. Guests will be writing in their workbooks, so a surface to write on is ideal.
17. If a large table isn't available, no worries — LCE provides clipboards so every guest can write comfortably regardless of seating arrangement.
18. Prepare light refreshments for your guests. The “sip” in Sip & Prep is entirely your call — sparkling water, lemonade, tea, coffee, and mocktails all make lovely options. Whatever feels right for your group and the occasion works perfectly.
19. Have a small table or clear surface available for Kelli's materials.

20. Let guests know in advance that both a printed workbook and a digital version will be available, so they can plan to bring a tablet, phone, or laptop if they prefer to work digitally.
21. A welcoming atmosphere goes a long way — soft background music before guests arrive, a simple centerpiece, and good lighting all set a calm, intentional tone.

Step 5 — The Day of Your Event

22. Allow 10–15 minutes for guests to arrive and settle in before the session begins.
23. Kelli will handle all facilitation, workbook distribution, and Q&A.
24. Plan for approximately 90 minutes total (may vary slightly by group size and discussion).
25. Collect any remaining guest payments and settle any overage with Kelli at the close of the event.

Step 6 — After the Event

26. Encourage guests to follow Legacy Consulting and Events for next steps and additional services.
27. With your guests' permission, share a photo from the gathering on social media and tag @LegacyConsultingEvents.
28. You'll receive your special host thank-you gift from Kelli!

Host Checklist at a Glance

4+ Weeks Before
☐ Confirm date with Kelli via email
☐ Select your 5 topics from the Topic Menu
☐ Submit \$100 deposit via Zelle
☐ Begin inviting guests using the templates below
2–3 Weeks Before
☐ Follow up with guests who haven't RSVP'd
☐ Share the event on Facebook or Instagram if desired
☐ Begin collecting payment from guests
7 Days Before
☐ Finalize confirmed guest count

- ☐ Pay remaining balance to LCE via Zelle
- ☐ Confirm event address with Kelli
- ☐ Send reminder to confirmed guests
- ☐ Let guests know both printed and digital workbooks are available

Day Before & Day Of

- ☐ Set up seating and space
- ☐ Prepare refreshments
- ☐ Send a quick “See you tomorrow!” message to guests
- ☐ Welcome guests warmly — you’ve done something meaningful for them

Invitation Wording Samples

Use these exactly as written, personalize them in your own voice, or let them inspire your own invitation. Be sure to fill in your 5 selected topics where indicated so guests know what to expect.

Sample Digital Flyer

Sip & Prep — A Calm First Step Toward Readiness

I’m hosting a Legacy Consulting and Events Sip & Prep gathering and would love for you to be there.

It’s a guided, relaxed experience designed to help us begin organizing important information — without overwhelm or pressure.

We’ll cover these 5 topics together:

• [Topic 1]

• [Topic 2]

• [Topic 3]

• [Topic 4]

• [Topic 5]

Each guest will receive a workbook (printed or digital) and leave with clarity and simple next steps.

 Location: [Your address or “My Home”]

 Date: [Insert date]  Time: [Insert time]

 **Cost:** \$25 per person (workbook included)

Bringing a spouse, sibling, or your adult child? Ask about our Shared Household Rate — \$45 for two.

Presented by Legacy Consulting and Events, L.L.C.

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RSVP to me by: [Insert RSVP date]

Sample Email Invitation

Subject: Join me for something meaningful (but not overwhelming 😊)

Hi [Name],

I'm hosting a Sip & Prep gathering with Legacy Consulting and Events, and I immediately thought of you.

It's a relaxed, guided evening to help us begin organizing important information — medical details, emergency contacts, financial basics — in a calm, practical way.

This isn't about finishing everything. It's about beginning with clarity.

Here's what we'll cover:

• [Topic 1] • [Topic 2] • [Topic 3] • [Topic 4] • [Topic 5]

Each guest receives a workbook (printed or digital), and the session is led by Kelli Edwards of Legacy Consulting and Events using the A.P.T.™ Method.

 **Date:** [Insert date]  **Time:** [Insert time]  **Location:** [Insert address]  **\$25/person**
(Shared Household Rate available: \$45 for two immediate family members)

If you've been meaning to get things in order but haven't known where to start, this is a genuinely approachable first step.

Let me know if you can come — I'd love to have you there.

[Your Name]

Text Message Options

TEXT 1 — Short & Direct

I'm hosting a Sip & Prep at my place — a calm, guided way to begin organizing important info like [Topic 1], [Topic 2], and more. \$25, workbook included. Want details?

TEXT 2 — Friendly & Warm

Hosting a Legacy Consulting and Events Sip & Prep — a relaxed evening to start getting things like [Topic 1] and [Topic 2] organized. No pressure, just a good first step. \$25/person (\$45 for couples/family pairs). Interested?

TEXT 3 — Reminder

Reminder: Sip & Prep at my place on [date]! We're covering [Topic 1], [Topic 2], and more. Let me know if you're in 😊

📷 Facebook & Instagram Caption

Something meaningful is happening at my home on [date] — and I'd love for you to be there.

I'm hosting a Sip & Prep gathering with Legacy Consulting and Events — a guided, relaxed experience to help us start getting important information organized.

We'll cover: • [Topic 1] • [Topic 2] • [Topic 3] • [Topic 4] • [Topic 5]

No pressure. No perfection. Just a calm first step.

*📅 [Date] 🕒 [Time] 📍 My home 💰 \$25/person — printed or digital workbook included
(Shared Household Rate: \$45 for two immediate family members attending together)*

DM me or comment below to RSVP. Space is limited!

#SipAndPrep #LegacyConsultingEvents #APTMethod #GetOrganized #LifePrep

🔄 RSVP Follow-Up Text

Hi [Name]! Just checking in about the Sip & Prep at my place on [date]. I'm finalizing the guest list — would love to know if you can join us. Hope to see you there! 😊

Frequently Asked Questions

What if I don't reach 8 guests?

The minimum of 8 is required to confirm the event. If your count falls short, please reach out to Kelli as soon as possible. We'll work together to either reschedule or discuss your options. To give yourself the best chance, we recommend inviting 12–15 people — life happens, and over-inviting ensures you hit your minimum with ease.

What if more than 8 guests attend?

Wonderful! Any guests above your confirmed count are welcome. The additional balance (\$25 per extra guest) is simply settled at the close of the event.

Is there a discount for couples or family members attending together?

Yes! We offer a Shared Household Rate of \$45 total for two members of the same immediate family attending together — spouse, sibling, or a parent/adult child. This rate is not intended for roommates or unrelated guests, since it's designed to support people who are likely preparing this information together as a family unit.

How much space do I need?

A living room, dining room, community space, or private dining area works beautifully. Guests will be writing in their workbooks, so some surface to write on is helpful. If a large table isn't available, LCE brings clipboards so every guest can work comfortably in any seating arrangement.

Will guests need to bring anything?

Guests who prefer to work digitally are welcome to bring a tablet, phone, or laptop. A fillable digital version of the workbook will be available for those who prefer it. Guests working on paper receive a printed workbook — no preparation needed on their end.

What refreshments should I offer?

Light refreshments are a lovely touch and completely your call. Sparkling water, lemonade, tea, coffee, juice, or mocktails all work wonderfully and create a welcoming atmosphere. Whatever feels right for your group is the right choice.

How long does the event last?

Plan for approximately 90 minutes, though this may vary slightly by group size and discussion. The pace is relaxed — never rushed.

Can I host somewhere other than my home?

Absolutely. Church fellowship halls, community centers, office break rooms, and private dining spaces all work beautifully. Just ensure the space is quiet, comfortable, and available for approximately 2 hours to allow for setup and wind-down.

Can I host more than once?

Yes! Many hosts find that after their first Sip & Prep, they want to host again for a different circle of people. You can select all new topics, keep the same ones, or mix it up. Repeat hosts are always warmly welcomed.

What if I need to cancel or reschedule?

Please notify Kelli as soon as possible. The \$100 deposit is non-refundable. Rescheduling requests are honored based on calendar availability, and your deposit may be applied to a new date at Kelli's discretion.

Can out-of-town guests participate virtually?

This is worth exploring! If you have loved ones who would benefit from this experience but can't attend in person, reach out to Kelli to discuss hybrid options. Virtual participation may be available for select gatherings.

Ideas to Make Your Sip & Prep Memorable

These are entirely optional — but they can turn a helpful evening into a truly special one.

- Give it a theme. “Night In with Purpose,” “Get It Together Night,” or “Family Clarity Night” can make your invitations feel warm and intentional.
- Create a simple centerpiece. Candles, greenery, or a small sign that says “You're worth planning for” sets a calm, welcoming tone.

- Offer a door prize or small favor. A candle, journal, or self-care item is a thoughtful way to thank your guests for showing up.
- Take a group photo. Capture the moment with your guests' permission and share it — a beautiful memory that also helps spread the word about LCE.
- Follow up the next day. A simple message saying, "So glad we did this together" deepens the connection and community you've created.
- Share Kelli's contact information. Leave a card or flyer available so guests can explore one-on-one services after the event.
- Pair it with a meaningful moment. A Sip & Prep works beautifully before a milestone birthday, at a new year, as part of a faith community gathering, or any time a group is ready to move forward together.

Ready to Book?

Contact Legacy Consulting and Events, L.L.C.	
Email:	legacyconsultingandevents@gmail.com
Website:	LegacyConsultingEvents.com
Zelle (payments):	legacyconsultingandevents@gmail.com
To request a date, email us with:	
• Your name	
• 2–3 preferred dates	
• Approximate number of guests	
• Your city / location	
• Your 5 selected topics (from the Topic Menu)	
We'll respond within 48 hours to confirm availability.	

"You've already done the hardest part — you said yes to caring for your people."
— Kelli Edwards, Legacy Consulting and Events, L.L.C.