



# ✓ Master Event Planning Checklist

Complete timeline from 12 months out to event day

**How to use this checklist:** Work through each stage in order. Check off items as completed. Items marked **HIGH** should be booked first — popular vendors and venues fill up fast, especially in NYC.

📁 Stage 1 — Initial Planning & Vision		12+ Months Before
<input type="checkbox"/> <b>Define event purpose &amp; goals</b> Wedding, corporate gala, birthday, festival, etc.		HIGH
<input type="checkbox"/> <b>Set a realistic total budget</b> Include 10–15% contingency buffer for surprises		HIGH
<input type="checkbox"/> <b>Choose an event date (+ 2 backup dates)</b> Check holidays, local events, guest availability		HIGH
<input type="checkbox"/> <b>Estimate guest count</b> Rough number is fine — refine later		MED
<input type="checkbox"/> <b>Create an event concept / mood board</b> Colors, theme, atmosphere, formality level		LOW
<input type="checkbox"/> <b>Identify key stakeholders &amp; decision-makers</b> Who has final approval on major decisions?		MED
<input type="checkbox"/> <b>Research event permits required</b> NYC parks, street closures, liquor license, etc.		HIGH

📁 Stage 2 — Venue & Vendors		9–12 Months Before
<input type="checkbox"/> <b>Research &amp; visit at least 3 venues</b> Compare capacity, parking, catering, AV, accessibility		HIGH
<input type="checkbox"/> <b>Book &amp; sign venue contract</b> Confirm deposit amount, cancellation policy		HIGH
<input type="checkbox"/> <b>Book entertainment company</b> DJ, live band, performers — top vendors book 6–12 months out		HIGH
<input type="checkbox"/> <b>Book stage &amp; sound rental</b> Stage, PA system, lighting — especially for outdoor events		HIGH
<input type="checkbox"/> <b>Book catering / food service</b> Confirm menu options, dietary accommodations, staffing		HIGH
<input type="checkbox"/> <b>Book photographer &amp; videographer</b> Review portfolio, packages, overtime rates		HIGH
<input type="checkbox"/> <b>Book florist / décor vendor</b> Balloon decor, centerpieces, draping, lighting		MED
<input type="checkbox"/> <b>Book transportation if needed</b> Shuttle, limo, valet parking service		MED

### ✉ Stage 3 — Invitations

6–9 Months

- Finalize guest list HIGH
- Design & order invitations MED
- Send save-the-dates MED
- Set up RSVP system MED
- Mail formal invitations HIGH  
Mail 6–8 weeks before event
- Track RSVPs & follow up MED
- Confirm final headcount HIGH  
Share with caterer & venue

### 🎨 Stage 4 — Décor & Theme

4–6 Months

- Finalize color palette & theme HIGH
- Order custom balloon décor MED
- Plan table centerpieces MED
- Order linens & draping MED
- Design signage & programs LOW
- Plan entrance & photo backdrop MED
- Confirm lighting design MED

### 🎵 Stage 5 — Entertainment & A/V Details

2–4 Months Before

- Provide playlist / do-not-play list to DJ HIGH  
Include must-play songs and any special requests
- Plan entertainment program / run of show HIGH  
Timeline with all segments, speeches, performances
- Confirm sound system & stage setup specs HIGH  
Number of mics, monitor placement, power requirements
- Arrange photo booth or interactive activity MED  
Props, backdrop, digital or print options
- Book any special performers MED  
Magician, caricature artist, aerialist, etc.
- Plan slideshow or video presentation LOW  
Confirm projector / screen availability with venue

## 📅 Stage 6 — Vendor Confirmations

4–6 Weeks Before

- Reconfirm all vendors in writing HIGH
- Collect COI from vendors if required HIGH  
Venue may require insurance certificates
- Share event timeline with all vendors HIGH
- Confirm vendor load-in & load-out times MED
- Confirm parking / venue access for vendors MED
- Finalize headcount with caterer HIGH
- Review all contracts for final payment due dates HIGH

## 📅 Stage 7 — Final Prep

1–2 Weeks Before

- Create detailed day-of timeline HIGH
- Print vendor contact sheet HIGH
- Prepare payment envelopes HIGH  
Cash gratuities, final balance payments
- Do venue walkthrough MED
- Confirm transportation & logistics MED
- Charge all devices & batteries LOW
- Prepare emergency kit MED  
Tape, scissors, safety pins, pain reliever, etc.

## 📅 Stage 8 — Event Day

Day Of

- Arrive early — at least 2 hours before guests HIGH  
Allow time for setup, changes, and surprises
- Supervise vendor load-in & setup HIGH
- Do sound check with DJ / band HIGH
- Confirm caterer is on schedule HIGH
- Walk the event space — verify all décor is in place MED
- Brief all staff on run-of-show timeline HIGH
- Enjoy your event! 🎉 LOW

### 📝 Planning Notes