

## **Developing a Client Appreciation Event**

- 1) Who do you want to invite? We suggest that you invite your “A Clients” on your first round, along with those clients that you think will provide good referrals/contacts. You want to encourage your clients to bring a friend(s) that might like to learn more about the topic and your services.
- 2) What is the most convenient time for the event? Maybe a Friday or Saturday night for your clientele.
- 3) Where? What is the most convenient location...are your clients spread out...so maybe you want to have more than one event in different locations.
- 4) Format for your event? Here are some ideas:

\*Cocktails and hors d'oeuvres with a sit-down dinner (evening)

\*Grazing table with sophisticated “small bites” creating an atmosphere for more socializing (late afternoon/early evening)

These types of events lend themselves to having a formal thank you to your clients and a welcome to their guests, plus a short (maybe 20-30 minute presentation). Be sure whatever presentation you use is compliance-approved or you need to submit it for review.

Presentation ideas for this format include:

- Show one of the brief presentations from the Partners Advantage Sales System
- Topic of general interest to group, such as “How to Avoid Identity Theft.” The National Ethics Bureau has a nice brochure on this that you can use as the substance for a brief presentation.
- Invite a guest speaker with an appropriate and interesting topic/presentation

Another option is to have a more fun event – without a financial focus:

\*Wine & Cheese Tasting (weekend afternoon)

\*Golf Clinic (weekend morning or afternoon)

- 5) When people RSVP – get complete names and correct spelling for all attendees and guests. Print nice-looking nametags for everyone who will attend.
- 6) Be sure to send everyone who attends home with one or two special gifts – maybe provide one gift to everyone and have a few fun drawings for some others.

*See Sample Client Appreciation Event Letter on next page...*

*Sample Client Appreciation Letter*

Dear {Client Name}:

I am very excited to invite you to a special event to celebrate YOU!

Appreciation is something that is not seen or experienced nearly enough today. So, I wanted to set aside a special time to say thank you for the opportunity to know you and serve your insurance and financial needs.

You are cordially invited to...

What: Client Appreciation Event  
Featuring: "highlight the special presentation or attraction here"  
Where: Location  
Address  
When: Date and Time

At this event, you'll enjoy an entertaining evening of food and fun. Plus you'll receive some special thank you gifts.

I would also like to extend the invitation for you to bring your friends or family to this event as well. Please RSVP by {DATE} by calling {phone number here for reservations}.

Sincerely,

Agent Name

Insurance Lic # *(If in CA make sure Lic # is in the same font size as largest phone #)*

Registered Representative information (if applicable)/Licensed Insurance Agent

Respond and learn how life insurance or annuities can be used in various planning strategies for retirement.  
No legal, tax or accounting advice will be provided. #14856 252039