

Innovative Client/Prospect Events



Success Recipe!

1. Make events intimate, biggest mistake - making events too big.
2. Suggest bringing sourced name(s) from client's LinkedIn connections.
3. Advisor outreach, do not delegate to assistant, advisor should invite by making the phone calls.
4. Make sure it is fun, do not discuss business!
5. Involve client/ prospects spouse/significant other, before, during & after.
6. Confirm 1-2 days before event with the assumption clients will be attending "Bill we can't wait to see you and Jen, we got her favorite Merlot! She's going to love it." You are making the assumption Bill & Jen will be attending the event.

Creating an experience is not just about entertaining your clients and prospects, it is about engaging them! Think outside the box, the goal is to zero in on **your** interests, whether it is art, travel, leisure activities and/or community events, then customize the events to those interests. This helps connect you with whom you have a natural affinity.

Event:	Idea:
1. Culinary Delight	Create a truly bonding experience by hosting a special cooking class demonstration either in your own home or at an establishment such as Sur La Table, Williams Sonoma or Whole Foods. Consider different formats – clients/prospects can cook a complete dinner, different courses or a sampling of 'small plates'.
2. Private Gallery Showing	Appreciate fine art and enjoy browsing art galleries? Host a private gallery showing at an upscale local gallery or museum. This type of event shows your support for the arts and introduces you to affluent art collectors. Be sure to have plenty of upscale hors d'oeuvres on hand for attendees.
3. Luxury Travel Event	Do you love to travel? Chances are your clients & prospects do as well. Use a travel expert or luxury travel consultant to deliver an informative discussion on new travel trends. Enhance the event with upscale native cuisine associated with one of the vacation locales to accompany the discussion.
4. Innovate Gift Showcase	Need to find the perfect gift for the person who has everything? The affluent struggle when searching for the perfect gift. Consider hosting a gift showcase with stores such as Neiman Marcus, The Sharper Image, Tiffany's – can use the theme 'Breakfast at Tiffany's'.

Event:	Idea:
5. Time Share Jet Experience	Love the idea of a flying version of time-shares? Most affluent do! Provide your clients with the opportunity to learn more about time-share jets by having an aviation rep discuss the various programs. Marquis, BlueStar Jets and NetJets are a few companies that offer time-share jet experiences. Create white-glove ambience by hosting a tented cocktail party at a private airstrip.
6. Luxury Real Estate	Do you offer lending services? Considering hosting an event where you partner with a high-end home builder/architect, a real estate agent, an upscale interior designer and/or a landscape architect. Contact luxury home builders, most will allow you to host the event in a home that has not yet sold.
7. Designer Trunk Show	Fashion your passion? Host a designer trunk show where artists and designers can promote their latest work. Trunk shows provide a more relaxed environment and these types of events attract affluent women.
8. Luxury Spa Event	Plan an event at an upscale spa to discuss the latest in mind/body treatments. Many luxury hotels have spent millions of dollars on their spas, considering contacting them to host the event as well as have the spa staff deliver a discussion on the benefits of mind/body programs. Serve spa-cuisine!
9. Private Car	The affluent have a passion for exclusive cars and motorcycles. Host an event where they can road test concept cars – bring in a professional driving instructor. Porsche and similar high-end dealerships realize the potential for their business and will work with you. Motorcycles a passion? Harley-Davidson has invested a great deal in their dealerships. They understand the concept of creating the right client experiences.
10. Fishing Trip	Some of your clients and prospect may be avid fishermen. If this a passion you share, consider chartering a fishing vessel and catch lunch for the day! This is a great father/son event.

BONUS: Additional Intimate Event Ideas!

- ✓ Wine Tastings
- ✓ Scotch Tastings
- ✓ Chocolate Tastings
- ✓ Coffee Tastings
- ✓ Retirement Parties
- ✓ Holiday Parties
- ✓ Birthday Parties
- ✓ Valentines Day Lunch for Widows
- ✓ Gardening Events
- ✓ Tea Parties
- ✓ Grandmother Baby Showers
- ✓ Zoo day for families
- ✓ Museum day (or night) for families
- ✓ Outdoor theater night for families
- ✓ Old fashioned 4th of July BBQ
- ✓ Barbeques for families
- ✓ Father son batting practice @ minor league park