eMoney

7 Ways Advisors Can Surprise and Delight Clients

Sometimes the small (or big) gestures you make go a long way towards building strong client relationships.

1 Have your client's favorite drink ready

Elevate in-office meetings by serving their preferred beverage. When the occasion calls for it, pop a bottle of champagne or sparkling water to help clients celebrate.

2 Honor milestones

Commemorate important events like birthdays, new babies, and retirement with personalized gestures or gifts.

3 Share a sightseeing book or guide

When clients travel to fun destinations, gift them a travel guide to enhance their experience.

4 Consider virtual events

Host online events to engage clients and prospects, making it convenient for those who prefer remote interactions.

5 Celebrate "Galentine's Day"

Invite single, divorced, or widowed female clients to a Galentine's meal to celebrate the day and them.

6 Extend invites to a +1

Allow clients to bring a guest to events, fostering a sense of community and inclusivity.

7 Commit to a service calendar

Maintain a schedule of regular check-ins and updates to ensure consistent and proactive service.

Check out this service calendar example!

Example Service Calendar

January	Portfolio Review; Portfolio Rebalancing
February	Client Education Event
March	Financial Plan Review; *3 pm call!*
April	Tax Return Post-mortem Review; Portfolio Rebalancing
May	Budget and Debt Review; Credit Check
June	Check-in on Ongoing Tasks; !!
July	Mid-year Update; Portfolio Rebalancing
August	Client Appreciation Event
September	Estate Planning Review (even years); Insurance Planning Review (odd years)
October	Employee Benefits Review (or Medicare); Portfolio Rebalancing
November	Year-end Tax Planning; RMD Check-in
December	Tax Loss Harvesting; 401(k) Election Review