

# Client Events and Gifts that Connect

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Build relationships, drive awareness of services, and support business growth through engaging client appreciation events and gifts



The following ideas for hosted in-person and virtual events and thoughtful gifts can help you increase client engagement and strengthen relationships. Adding these client touch points throughout the year will complement your ongoing communication and marketing initiatives and help drive referrals. Personalized lifestyle and non-financial events and gifts can help increase client engagement.



## Engaging Client Event Ideas



## Food & Wine Events

- Wine tastings at a local vineyard
- Farm-to-table dinners: Host an elegant dinner at a local farm or vineyard under the stars with a local chef onsite featuring their own produce and/or wine
- Cater a theme dinner (such as a pig roast) to leave you time to converse with clients
- Quarterly client birthday or retirement lunches. Ask each client to bring a friend!
- Dinner with the chef: Book the chef's table at a local restaurant or reserve the private dining room.

## Sports & Adventures

- Tour major league ballpark or NFL football stadium
- Guided tour: NASCAR Hall of Fame, Basketball Hall of Fame, etc.
- Hold a sports clinic
- Rock climbing activity center
- Sailboat or kayaking lesson
- Fishing expeditions
- Skeet shooting
- Race car driving experience
- Scuba diving training
- Hot air balloon, glider, helicopter rides, or flying lessons
- Organize a group to run a 5k or 10k
- Group dance lesson
- Golf outing or tournament





## Events Including Small Children

- Pizza party: Make your own pizza at a local pizza shop
- Fishing outing
- Safety workshop: Tips and ID kits from police officers or firemen
- Fun contests: Hold a sandcastle or snowman building contest
- Art party: Host a painting or pottery party
- Summer picnic: Host a family-centric BBQ with food and entertainment for clients and their children



## Expert Demonstrations

- How to set up a home theater
- Interior design or landscaping workshop
- Home improvement workshops (at retailers like Home Depot)
- Social media or technology tutorials: Account set-up, device features and functions
- Personal trainer or nutritionist consultation
- Personal organizing: Closets, garages, house, life
- CPR and emergency safety training
- Guest speakers & speaking engagements
- Expectant parents series: Selecting a pediatrician, what to expect during the first year
- Emergency car care: How to change a tire or jumpstart a car
- How to read your financial statements
- Inspirational talks for families: How teenagers and parents can better communicate
- Fortune teller, tarot card readings, handwriting analysis
- Hypnotist specializing in developing healthy habits
- Family therapist: How to create family traditions in the digital age
- Travel agent: Special vacation destinations

## Additional Engaging Client Event Ideas

- Supercharged car day: Partner with a high-performance car dealership for a private showing and test drive
- Coffee or tea social: Book a mobile coffee cart to come to the office or reserve a private room for an informal tea party
- Sponsor a charitable event: Ask a group of clients to attend the volunteer activity with their children and share photos as a keepsake. Ideas include tree planting, Habitat for Humanity, activities that encourage community involvement.
- Family photos: Hire a professional photographer to take studio or seasonal photos
- Theater night: Sponsor an exclusive night of theater at a local playhouse; provide clients with 4 tickets: 2 for themselves and 2 for friends who might be “future friends of the firm.” This can be modified to include a select set of clients, friends, and dinner.





# Virtual Client Event Ideas



## Health Topics

- Coping through crisis: Co-host a Q&A session with a local psychologist on coping with life's challenges. Have clients send in questions ahead of time to protect their privacy.
- Fitness: Co-host with a local personal trainer to provide tips on staying fit or sponsor a yoga class.
- How to eat well when all you want is comfort food: Co-host with a local dietitian/ nutritionist on ideas for fun but nutritious menus. Send a branded recipe booklet after the event.

## Food & Drink Events

- Craft cocktails and conversation: Host a small group of clients for a craft cocktail evening. Send them the recipe and ingredients to a cocktail and have a bartender show them how to make it. You could also send cold hors'd'oevres to enjoy with the cocktails.
- Wine or whiskey tasting/chocolate pairing: Host a small group of clients for a wine tasting event with a sommelier or whiskey tasting with an expert distiller. Use a company that can provide the wine/whiskey and sommelier/ distiller. Could also be a wine and chocolate pairing.
- Cooking class: Bring in a chef to teach a holiday-themed cooking class from your house or from a local restaurant. Send ingredients ahead of time. Could be tailored to age group also. i.e. festive holiday cookie decorating for children.



## Entertainment

- Film event: Host a movie night with chat function via [www.netflixparty.com](http://www.netflixparty.com) and send a pre-event popcorn or snack
- Paint night: Hire a company to create a virtual paint party that you can host. Supplies are sent ahead of time for a painting lesson with an instructor or a paint by number project. Team up with a local winery to make it a paint and sip event.



- Trivia/murder mystery: Use a play-by-mobile app to play a virtual trivia game, family jeopardy, or murder mystery (this may be better for Halloween). Use Jackbox.tv for virtual team games. Send snacks prior to the event.
- Karaoke: [www.littlecinema.net](http://www.littlecinema.net) will send attendees their own wireless hand-held microphones for a virtual karaoke session. They will host the session where guests are encouraged to make requests and sing along and share on social media.
- Music: Use local musicians to play a Zoom concert for clients and their family and friends.

## Other Virtual Client Events

- Virtual tours: Host a virtual tour of a museum, art gallery or heritage site with clients who like to travel.
- Planning travel & travel tips: Host an event with a local travel agent. Send a travel related gift post event. i.e. travel journal or luggage tag.
- Meet cartoon character/Santa/Easter bunny: Group webinar or individual zooms. This does not have to be very long, maybe 15 minutes of a chat with the character. After the event, send a screenshot of the child with the character.
- Charity: Host/ facilitate a charity event and ask for clients to submit charity ideas for the business sponsorship. Have a fun zoom event where people could cast their votes.
- Educational: Host a virtual educational webinar or roundtable that could be co-hosted with a COI or a local expert in the topic. COI clients could be invited along with family, friends, & colleagues of the advisor. Ask clients to send in questions ahead of time or open up the chat function.  
Topic ideas: Social Security, Privacy Protection/ Cybersecurity. Estate Planning, General Economic updates (use AssetMark to help facilitate), Tax changes under the current administration.





# Client Gift Giving Ideas

When selecting client gifts, try to personalize the gift by matching it to their lifestyle in a meaningful way.



## Gift Baskets

- Coffee – mug, coffee, chocolate, or biscotti
- Wine – bottle of wine, and wine glasses
- Halloween theme - jack-o-lanterns filled with candy and a note: "A few treats to 'invest' in your Halloween".
- Gourmet food and fruit baskets

## Specialty Food Subscriptions

- Cocktail and alcohol
- Cooking and baking
- Chocolate and desserts
- Coffee
- Snacks

## Books and Stationery

- Coffee table book
- Hobby or interest book
- Financial literacy book
- Travel guide
- Leather / artisan notebook or portfolio
- Personalized stamps
- Personalized notecards
- Pen set

## General

- Magazine Subscriptions – personalized to the client's interests
- Hometown specialty item
- Gift certificate from a local business (bakery, restaurant, salon)
- Framed picture or ornament from something from client's social media feed
- Charitable gift in honor of client
- Jewelry
- Personalized messages from celebrities

## New Grandparents/Parents

- Piggy bank
- Onesie with favorite (professional or school) team name
- Custom mugs with pictures of grandchildren

## Retirement / Hobby-based

- Gardening gloves
- Guitar picks
- Wine decanter
- Personalized luggage tags



## Pet Parents

- Basket of treats
- Mug with pet's name
- Monogrammed frame
- Toy

## New Job

- Yeti tumbler personalized with the client's name





# Client Gift Vendor Suggestions

Below are links for suggested client gift vendors. **Please note:** AssetMark does not have a relationship with these vendors; however, many offer business pricing.

## Branded Items

- [4Imprint](#)
- [Corkcicle](#)
- [Lands' End](#)
- [LL Bean](#)
- [RTIC Outdoors](#)

## Flowers & Plants

- [Farm Girl Flowers](#)
- [Urban Stems](#)

## Food & Beverage

- [Godiva](#)
- [Harry and David](#)
- [Spoonful of Comfort](#)
- [Sugarwish](#)
- [Omaha Steaks](#)
- [Truffle Shuffle](#)
- [Wine Country Gift Baskets](#)

## Corporate Gifting Platforms

- [&.Open](#)
- [Alyce](#)
- [CorporateGift.com](#)

- [Gift My Client](#)
- [Gift Pack](#)
- [Loop & Tie](#)
- [Northern Tool](#)
- [SnackNation](#)
- [Snappy](#)
- [SwagUp](#)
- [Sendoso](#)
- [Tiffany](#)

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