



YEAR ROUND MARKETING TIPS:

12 Months of Client Connection Strategies

Marketing Tips from the “Do It For Me” program to delight clients and fuel growth

■ September: Personalized Book Gift

After client meetings, give a nice coffee table book based on their interests. Shows attentiveness and creates conversation pieces.

■ October: Thanksgiving Pie Giveaway

Organize a pie giveaway for clients. Have them RSVP with their choice, then pick up at your office. Consider having a photographer to capture moments for marketing materials.

■ November: Client Appreciation Event Planning

Use surveys (via Typeform, Jotform, or Google Forms) to gather insights for planning client appreciation events. Or you can download this [editable PDF](#) and send this out to your clients. Utilize this [template](#) to build out your email.

- Note: Email and survey would need to be approved by your compliance department before use.

■ December: Personal Follow-Up Strategy

In client meetings, ask about upcoming plans. Set reminders to follow up after the event to ask how it was. It will WOW them and create a deeper bond with something very simple!

■ January: LinkedIn Connection Campaign

Send out [this email](#) to invite people to connect with you/follow you on LinkedIn to help broaden your network and increase impressions of your posts!

■ February: Tax Strategies Seminar

Organize an in-person or virtual presentation on timely tax strategies. Collaborate with your marketing specialist for planning and promotion.



■ **March: Women’s Retirement Strategies Night**

In honor of Women’s History Month - host a Ladies Night focusing on retirement strategies for women. Partner with local women’s organizations and cover topics on health and wealth (ex. insurance, savings and career gaps, dual-income investments, etc).

■ **April: Tax Pro Appreciation**

Send food baskets to tax professionals and CPAs in your network during their busiest season. Consider using Goldbelly for nationwide shipping.

■ **May: Mother’s Day Charity Partnership**

Partner with a local mothers’ charity. Organize volunteer opportunities, donate in clients’ honor, and promote on social media.

■ **June: Yappy Hour Event**

Plan and promote a pet-friendly “Yappy Hour” event. Use customizable postcards from the Downloadable Event Kit.

■ **July: Community Concert Connection**

Host clients at local summer concerts. Provide seating area, refreshments, and vouchers for nearby businesses to support the community.

■ **August: Exclusive Event Expansion**

One week after you send invitations, resend the invite with added text: “Wow, we’re thrilled by the excitement for the upcoming ‘xxxx’ event. Several attendees have reached out asking if you can bring guests. We are limited on space, but would love to host your friends or family. Please RSVP soon to bring guests and we’ll try to accommodate as many as we can.”

Looking for Additional Marketing Support?

Visit fmgsuite.com to access monthly marketing tips and learn how our “Do It For Me” program can supercharge your business growth.