



Inspiration to Surprise, Delight, and Deepen Client Relationships

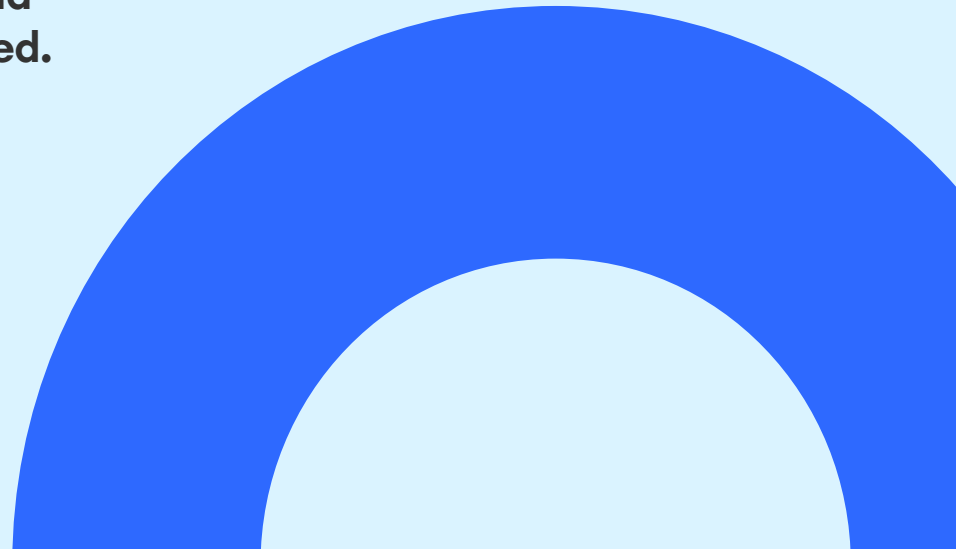
Client Appreciation: Gifting Playbook

Gifting is more than a thoughtful gesture – it's a strategic way to reinforce your value.

Use this playbook as your year-round reference to build deeper relationships through:

- Onboarding gifts
- Milestone & Triggered Gifting
- Surprise & Delight Moments
- Holidays

While AI can automate reminders, only YOU can add the human touch that makes clients feel truly valued.





Onboarding Gifts

Create a seamless, memorable welcome experience.

Signed paperwork received

Personal handwritten note welcoming them to your firm.

First meeting completed

Celebrate with a tailored gift tied to their interest (e.g., wine for an enthusiast, golf balls for golfer).

First meeting scheduled

Send a small branded gift (e.g., luxury notebook, pen, or coffee gift card).

30 days in

Follow up with a “welcome to the family” video or card signed by the entire team.

Gift Ideas:

- High-quality leather-bound notebook with your logo subtly embossed
- Local artisan treats (cookies, chocolates, honey)
- Personalized coffee mug or insulated water bottle
- Branded welcome kit (pen, notebook, desk accessory)
- Small plant for their desk/home office



Gather your client's personal interests after the first meeting and be sure to tag them accordingly in CRM.





Milestone & Triggered Gifting

Recognize meaningful life moments that matter most to your clients.

Key Events & Gift Ideas:



Birthday: Local bakery delivery, bottle of champagne, or personalized book



Anniversaries (wedding, client anniversary with your firm): Handwritten note plus a small gift like wine, specialty olive oil, or subscription box tied to their interests



Retirement: Engraved keepsake, luxury travel accessories, or curated “first year of retirement” basket



New home purchase: Cutting board engraved with family name, gift card to a local restaurant, or a home décor subscription box



Child or grandchild graduation: Branded leather portfolio, cashmere throw blanket, or gift card to a favorite retailer



Promotion or job change: Personalized desk nameplate, luxury pen set, or gift card to a professional wardrobe retailer

Surprise & Delight Moments

The unexpected gestures often make the deepest impression.

Examples:

- Send a coffee gift card on a rainy Monday with a “Hope this brightens your day” note
- Drop off flowers to a client celebrating a personal milestone
- Send a book tied to a client’s interest with a personal note
- Celebrate “Clientversaries” with a simple, personalized video message
- Remember pet lovers – send pet treats for birthdays or holidays



Keep detailed notes of key dates of special moments and set automated reminders to stay on top of it.



Holidays

The perfect opportunity to make a big, memorable impact across your client base.

Gift Ideas:



Thanksgiving:

- Pumpkin pie or gourmet pie delivery
- Gratitude journals
- Handwritten gratitude cards from your team



Winter Holidays:

- Locally sourced gift baskets
- Personalized charcuterie boards
- Photo frames or stationery
- Holiday decorations like tasteful ornaments
- Experience gifts like wine tasting vouchers or cooking classes



New Year:

- Wellness-focused gifts – calendars, journals, or fitness class gift cards



All-Season Options:

- Seasonal treats like artisanal coffee blends, gourmet chocolates, or baked holiday desserts
- Home goods like cozy blankets and candles
- Charitable donations made in a client's name

Schedule a quick 20-minute consultation to learn how the experts in our “Do It For Me” program can help take gifting and more off of your plate so **you can focus on what matters most – serving your clients.**

[Book My Consultation](#)