



LIVE DISCUSSION:

Your Human Advantage – Do What AI Can't!



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"Do It For Me" Concierge



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Free Giveaway:

Client Gifting Playbook



fmg

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.



Your Human Advantage

01

Gift Giving

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.





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



Your Human Advantage

02

In Person Events

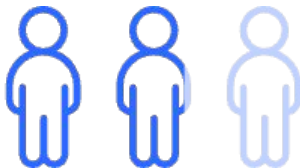
How many advisors are currently focused on hosting:

23%



Webinars

16%



In-Person Events

In-Person Events: **Building Meaningful Connections**

Networking in person is a powerful way to:

- Create memorable experiences attendees will want to share
- Engage with clients and prospects on a personal level
- Demonstrate expertise through direct interaction
- Encourage networking and referrals
- Deepen client relationships across generations – don't forget to invite clients' children



16%

of advisors focus on hosting in-person events*



In Person Events That Bring the **WHOLE** family

Cerulli Finds Just 19% of Investors Use Their Parents' Advisor

NOVEMBER 14, 2023 — BOSTON

An opportunity exists for advisors to focus on kindling intergenerational relationships

Just one in five affluent investors use the same advisor as their parents, according to the latest ***Cerulli Edge—U.S. Retail Investor Edition***. Advisors

FINANCIAL
ADVISOR **IQ**

Most Americans Inheriting \$100K+ Won't Stay with Their FA

Financial advisors who can address their clients' big picture, and not just their finances, stand to gain new clients, according to a new report from Equitable.

By Alex Padalka | October 10, 2024

The coming wealth transfer may leave some financial advisors wondering where all their clients went — while others may have a field of prospects ripe for the picking, according to a new report.


A recent McKinsey study estimates that more than \$30 trillion will change hands by 2030 — and most of the recipients will be looking for a new advisor. Equitable said it found in a survey of 500 retail investors anticipating receiving an inheritance or primary benefit of more than \$100,000.

Family Picture Day Event

- Hire local photographer
- Choose Venue
- Send clients SignUp Genius Form
- You pay photographer, they pay for photos they want
- Collect names/emails of ALL family members at event
- Have (stain free!) snacks and water on hand!



Family Wealth Conversations - Downloadable



FAMILY FINANCIAL WORKSHOP

Company Name

FAMILY MISSION STATEMENT ACTIVITY

A mission statement is designed to build a shared identity and vision within a company or family. A family mission statement has a very similar purpose—to help you live intentionally and consciously embrace your values.

STEP 2: WRITE DOWN YOUR VALUES

Give every member of the family an opportunity to write down the values that he or she feels are important to the family.

<input type="checkbox"/> Love	<input type="checkbox"/> Creativity	<input type="checkbox"/> Hard Work
<input type="checkbox"/> Fun	<input type="checkbox"/> Discipline	<input type="checkbox"/> Humor
<input type="checkbox"/> Adventure	<input type="checkbox"/> Honesty	<input type="checkbox"/> Community
<input type="checkbox"/> Education	<input type="checkbox"/> Kindness	<input type="checkbox"/> Integrity
<input type="checkbox"/> Faith	<input type="checkbox"/> Compassion	<input type="checkbox"/> Service

STEP 3: DISCUSS YOUR VALUES AND CHOOSE FEWER THAN 10 TO CONSTRUCT YOUR MISSION STATEMENT

After everyone has written down the values that matter to them, discuss them as a family. The most important thing is to listen carefully to every member of the family no matter how young.

Even children want to know that their contribution matters.

STEP 4: DRAFT 1:

and adventure in a way that is true to our faith, strengthens our family, and working as

STEP 5: REFINE YOUR MISSION STATEMENT


FAMILY MISSION STATEMENT DRAFT 2:

STEP 6: REVIEW REGULARLY

Your mission statement should be a living document that inspires your day-to-day life.

Keep copies of it on your fridge, in your office, and in your children's rooms so that you can refer to it often.

TELLING STORIES ABOUT WEALTH



Describe a financial mistake or important lesson you've learned in life.

Describe a time that you felt fortunate.

Describe a time that persistence and effort paid off.

Describe a time that you didn't have enough money.

Galantines Event

- Invite clients and let them bring a friend
- Widowed, married, divorced or single
- Host in a fun restaurant
- You provide wine and chocolate
- Invite everyone to dress up in red or pink



Pickleball Tournament

- You sponsor and organize the event
- Open to community
- Have signage and swag w/Logo
- Invite Pro to give lessons/compete
- Offer “Healthcare in retirement: because you know you want to keep playing pickleball!” follow up webinar or 1:1 Conversations



Events that brings similar clients together

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WISCONSIN WIDOWS CONNECTED 03.19.2025

19
March

Wisconsin Widows Connected: Giving Back

REGISTER

DESCRIPTION

Discover a variety of ways to give back through volunteering and philanthropic efforts. Jill Economou, Director of Community Relations at EIG, shares ideas for volunteering locally and the history of philanthropy at Ellenbecker Investment Group.

Social and conversation to follow. We'll also make fleece tie blankets for a local non-profit organization.

Wisconsin Widows Connected is a social and educational group dedicated to helping support female widows of all ages in creating a new normal. The ladies meet the third Wednesday of every month.

DATE AND TIME

Wed, Mar 19, 2025

5:30p - 7:00p CST

LOCATION

Ellenbecker Investment Group

N21 W23350 Ridgeview Parkway
Waukesha, WI 53188

NOTE

BrokerCheck by FINRA

Events for Young Professionals

- Offer Professional Headshots
- Salary negotiation tactics
- How much to ask for in a raise
- How to price products or services as a new business owner

Know Your Worth -- Financial Fitness Event

Description

Join us for Know Your Worth a WISE Financial Fitness Event!

Wondering how much to ask for when requesting a raise?

Not sure what to say when an employer asks for your desired salary?

Having a hard time deciding on pricing for your products or services?

We've got you covered! Join us at the Cambria Hotel as Financial Advisor MJ Roach gives you all the best tricks of the trade and empowers you to Know Your Worth!



DIFM Program Marketing Ideas/Tips



Marketing Tip

[Host a "Protecting Yourself and Loved Ones from Cyber Scams" Event](#)



Podcast or Webinar Outline

[Should You Pay Off Your Mortgage?](#)



Video Script of the Month

[Should You Pay Off Your Mortgage?](#)



Susan Theder

CMO/CXO, FMG



Samantha Russell

Chief Evangelist, FMG

Your Human Advantage

03

Promotion

Create a Registration Page People Want to Sign up!

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WEBINAR: SOCIAL SECURITY BENEFITS 01.30.2025

Join us virtually for clarity on Social Security topics that can often seem overwhelming. Learn how your benefit is determined, tips on when to start receiving benefits, how Medicare is connected, plus details on spousal benefits and survivor benefits.

Even if you attended a previous presentation, join us again as regulations change year to year. This webinar is open to the public - share with your spouse, family or a neighbor who is planning for this stage of life.

Live Webinar: Register for this live virtual session. Due to government restrictions, we are not able to record the session. Slides will be available for registrants after the webinar.

Before you attend...

During the presentation you will learn how to use "my Social Security" online account and other online services. In advance of the webinar, go to www.socialsecurity.gov/myaccount to create a my Social Security account and have your Social Security Statement (if applicable).

[Resources](#)[Events](#)[Contact](#)[REGISTER](#)

DATE AND TIME

Thu, Jan 30, 2025
1:00p - 3:00p CST

LOCATION

Webinar: Microsoft Teams

NOTE

Webinar only, presented via Microsoft Teams.

Email Promotion Specifics

Send THREE emails for optimal performance.

- 1 week before
- 1 day before
- 1 hour before

Number of Email Reminders	Average Registrants	Percentage increase over 1 email reminder
1 email reminder only	256	-
2 email reminders	474	+85%
3 email reminders	807	+215%
4 email reminders	798	+212%

Source: <https://danielwaas.com/how-to-increase-webinar-attendance-rates/>

How do you get more clients to refer friends and family?

Marketing Tip:

- To get your clients to bring friends and family to your in person events --- Do this: One week after sending out the initial invitation, resend the invite, but this time, add a few sentences: "Wow, we're thrilled by the excitement for the upcoming 'xxxx' event— we can't wait to see so many of you. Several attendees have reached out asking if you can bring a guest or two. We are limited on space, but would love to host your friends or family. Please RSVP as soon as possible and we'll try to accommodate as many as we can."

Promotion: What if I don't have a big email?

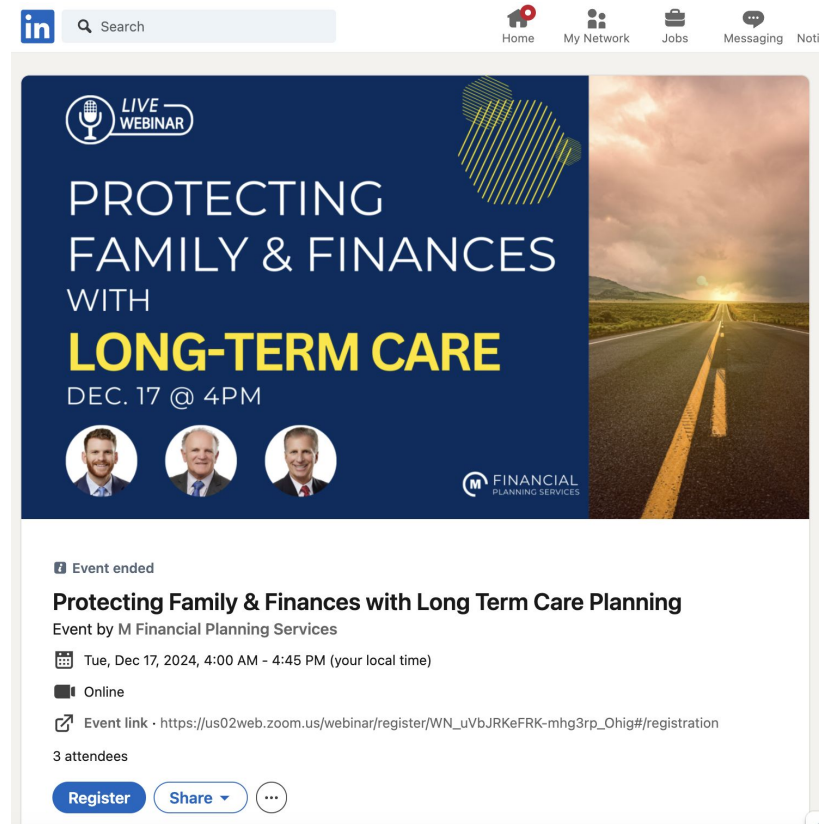
Partner with COI or SME

- Have as a guest and Ask them to promote to their audience too
- Or just share with COIs whose audience could benefit

Make a LINKEDIN EVENT PAGE!

- Posts that focus on the BENEFIT someone gets from joining
- Direct invites via LinkedIn - target your audience
- Setup LinkedIn Event page →

Encourage clients to share the email invite with others



Social Media Promotion Specifics

- Don't start your post by promoting your event
- Start by talking about a problem your audience has
- Then offer some quick wins (that they get just by reading the post)
- THEN say "we are going to do X event to teach more about this"



Samantha Russell • You

Chief Evangelist at FMG Suite | Keynote Speaker | Marketing + Fi...

1w • Edited • 🌐

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I used to host events and never get real leads from them.. until I started doing these 4 things.

- 1 Use the "WIIFM" approach to write the invitation/email/landing page
 - Clearly articulate what the person attending the event will get out of it
 - If it's a fun event - make it sound fun! include great photos!
 - If its educational, be crystal clear why they need to learn what you'll share
- 2 Have a way to collect names + email for EVERY SINGLE PERSON
 - 💡 TIP: If your event is a LinkedIn Live, Youtube Livestream, a Podcast:You can collect leads easily with [Textiful](#) (my favorite tool)
 - Just say "Text this number and we'll send X to you"
 - (Just be sure what you're sending is amazing and people will want it!)
- 3 If you want people to ACTUALLY spread the word and invite their friends or family:
 - Follow the exact email template I lay out in the video (at the 1:20 mark)
- 4 Skip the hard sell, follow up with even more valuable education:
 - Don't host a great event, but then only do a hard sell afterwards 😞
 - Nobody wants to come to your event and then get 15 emails after of you asking them if they are ready "meet about their finances"

Social Media Promotion Specifics

- Say “comment _ _ _ _” and I’ll send you the link to join us!
- This builds momentum and gets people commenting on the post – which then alerts the algorithm to show it to even more people
- Direct Message and ask for comments/shares
- If you are partnering with a COI or SME – make sure you tag them! Tag the venue too if applicable!

Next week on Thursday, we at **FMG** are hosting a live event where I'll teach you:

1. The top event ideas for 2025
2. How to attract high quality leads to your event
3. The best way to follow up with leads after the event

● If you want to join us, comment "EVENTS" and I'll send you the link to sign up!

BONUS: Everyone who joins signs up will receive an event success checklist with our key takeaways compiled for easy reference all year long!

you've ever held? I'm looking for an advisor to join me and talk about it so please share!



Want to learn more?

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com

