

NEW CLIENT WELCOME PROCESS

Welcome Gift Samples

The following is a list of potential items you may wish to choose as your Welcome Gift for your new client. They are accessible, come in a variety of price ranges, and are fairly universal in appeal. Therefore, they are easy to implement immediately.

- Accordion organizers with labels and instructions for filing financial documents.
- Administrative binder with tabs and pocket pages to make it user-friendly and highly-functional for holding account statements (this separate binder supplements the PFO binder).
- Fireproof/Waterproof Document Protector Case Leather Portfolio with Note Pad & Pen
- Coin Collection Album with Silver Dollar * [This can dove-tail with your Annual Anchor by sending a new coin each year]
- Photo Art Calendar (it must be stunning) [This can dove-tail with your Annual Anchor by sending a new calendar each year]
- Letter Opener and/or Writing Ensemble
- Unique Ceramic Coffee Mug Set, Stainless Steel Travel Mug Set
- Reusable Shopping Tote (with a meaningful proverb)
- High Quality Plant for Home/Yard
- Personalized Stationery Set with Quality Paper Holder (metal or wood) [This can dove-tail with your Annual Anchor by sending a new set of personalized stationery each year]
- Gift Basket with decadent chocolates, wine/cheese/crackers or other gourmet consumables
- Specialty Wine shipped in Unique Wooden Box
- A Book that is Impactful & Meaningful to Your Clients

** US Federal Reserve or Royal Canadian Mint. Some Advisors also use this as their annual anchor and add to the client's Silver Dollar collection each year on the account anniversary date or some other pre-determined time of year.*

