

# First Eagle Client Engagement Series: Valentine's Day Dinner

Financial professionals today are facing greater pressure to deliver a high caliber, differentiated client experience. Given the increase in competition, you are continuously tasked with showcasing the value of your services and keeping clients engaged.

First Eagle is committed to help you stand out from the crowd with your clients and prospects. To assist in this effort, we have developed the First Eagle Client Engagement Series. The series will provide various client & prospecting engagement ideas and actionable steps for implementation.

---

## What is the client appreciation opportunity?

Valentine's Day Dinner for Widows and Widowers

---

## Why this client appreciation event is a good opportunity for growing your business?

Valentine's Day is one of the hardest days for the widowed, making it a unique opportunity for financial professionals to go the extra mile to show appreciation for a client.

- Hosting a dinner or lunch is a great way for financial professionals to showcase their thoughtfulness and genuine appreciation for their clientele.
- Widowed clients who attend the event can extend an invitation to other widowers, allowing financial professionals to expand their network

---

## Recommended Execution Strategies:

- **Attendees:** Invite any widowed client; encourage them to bring a friend.
  - **Venue:** Restaurant or any event space available to you. Be mindful to pick an appropriately sized venue for the number of people in attendance.
  - **Event Ideas:**
    - Host a dinner or lunch. If dining at a restaurant, consider working with restaurant staff to set up a pre-fixe menu. If using an event space, use a local caterer or private chef. You can decide if you want to hire servers to bring food to the table or if you want the guests to serve themselves.
    - Hire a professional chef to lead a private cooking lesson for attendees. You can work with a local restaurant to host the event at their venue or hire a private chef and use an event space with a kitchen.
  - **Extras:**
    - Have boxes of chocolate and/or bottles of wine for guests to take home.
    - If you are hosting a cooking lesson, have print outs of the recipe you make as a group for each guest to take home.
- 

---

## INVITATION SUGGESTIONS

Use these best practices to create an invitation for your event. These ideas can be used for email, mail, or phone calls.

- Promote the event by sending engaging, friendly messages
- Include date, time, and location of the event—preferably in writing
- Provide details about what the event entails including what activities will take place and the food and beverages being served
- Give guests a “RSVP by” date and contact details
- Send a calendar invite via email to all attendees who RSVP yes
- Thank all attendees for coming after the event
- Take time to follow up with those who missed the event

---

**For Financial Professional Use Only.**

The opinions expressed are as of December 31, 2022, not necessarily those of the firm and are subject to change based on market and other conditions. **These materials are provided for informational purposes only.** These opinions are not intended to be a forecast of future events, a guarantee of future results, or investment advice. Any statistics contained herein have been obtained from sources believed to be reliable, but the accuracy of this information cannot be guaranteed. The views expressed herein may change at any time subsequent to the date of issue hereof. The information provided is not to be construed as a recommendation or an offer to buy or sell or the solicitation of an offer to buy or sell any security. The information in this piece is not intended to provide and should not be relied on for accounting, legal, and tax advice.

First Eagle Investments is the brand name for First Eagle Investment Management, LLC and its subsidiary investment advisers.

FEF Distributors, LLC ("FEFD") (SIPC), a limited purpose broker-dealer, distributes certain First Eagle products. FEFD does not provide services to any investor, but rather provides services to its First Eagle affiliates. As such, when FEFD presents a fund, strategy or other product to a prospective investor, FEFD and its representatives do not determine whether an investment in the fund, strategy or other product is in the best interests of, or is otherwise beneficial or suitable for, the investor. No statement by FEFD should be construed as a recommendation. Investors should exercise their own judgment and/or consult with a financial professional to determine whether it is advisable for the investor to invest in any First Eagle fund, strategy, or product.