

First Eagle Investments Client Engagement Series: March Madness

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 and prospecting engagement ideas and actionable steps for implementation.

What is the client appreciation opportunity?

March Madness game watch and networking event.

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

- Engage and show appreciation for your professional network and clients in a fun and exciting environment.
 - Build new relationships with clients' friends and associates, expanding your network in a casual, comfortable setting.
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Recommended Execution Strategies:

- **Attendees (two potential options):**
 - Current clients and prospects.
 - Professional referral sources.
 - Invite clients to bring brackets.
 - **Venue:**
 - Invite clients to bring brackets.
 - Event space with plenty of screens so clients can watch the games (Dave & Buster's, Top Golf, Buffalo Wild Wings, etc.).
 - If you have the space, turn your office into a March madness venue for the day.
 - If you are a member of a private club (country club, city club, sports club or boat club), rent out a space at your club and offer clients a private March Madness watch experience. Offer all attendees a take home dinner as well from the club.
 - Be mindful to pick an appropriately sized venue for the number of people in attendance.
 - **Meal:** Game day food and drink/pub fare.
 - **Extras:** Raffle tickets to future games in the area (advisor can be in attendance as another business building opportunity), basketball stress ball.
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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

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