

First Eagle Investments Client Engagement Series: Pickleball Tournament

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?

Gather clients and prospects for a fun inclusive pickleball tournament

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 and prospects to come to a pickleball tournament, create fun brackets.
 - Find an outdoor or indoor venue. Be mindful to pick an appropriately sized venue for the number of people in attendance.
 - If you are a member of a private club (country club, city club, or sports club) rent it out.
- **Meal:** Light food and refreshments.
- **Extras:** Bring everyone a pickle ball racket and ball!

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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