

First Eagle Client Engagement Series: Backpack Drive Volunteer Opportunity

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?

Backpack Drive Volunteer Opportunity

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

- Engage and show appreciation for your clients while giving back to your local community.
 - Build new relationships with clients' friends and associates, expanding your network in a casual, comfortable setting.
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Recommended Execution Strategies:

- **Attendees:**
 - Invite clients and their spouses and their children.
 - Encourage them to invite family and friends that would enjoy giving back to the community.
- **Event Ideas:**
 - Collect backpacks, pens, notebooks, and other school supplies and organize an event to fill backpacks.
 - Donate the stuffed backpacks to a local charity that supports children in need or a school district that needs them.
- **Extras:**
 - Make a donation in the names of the attendees to an organization that supports children in need or lower income neighborhoods.
 - Consider co-hosting with professional referral sources.

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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