

First Eagle Investments Client Engagement Series: College Application Coach

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?

College application coaching.

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

- Engage with the next generation of client assets and show appreciation for your current clients in a fun and educational environment.
- Build new relationships with clients' friends and family, expanding your network in a casual, comfortable setting.

Recommended Execution Strategies:

- **Attendees:**
 - Invite clients who have high school or college age children or grandchildren.
 - Consider co-hosting with a professional referral source to offset costs of the college application coach, photographer, or another professional hired to help.
- **Event Ideas:**
 - Bring in a professional college application coach to provide best practices:
 - › Creating a successful college application.
 - Offer 15-minute one-on-one sessions with the college application coach where they can review individual applications and provide feedback.
 - › Perfecting interview skills for a job, internship, or college.
 - Offer 15-minute one-on-one sessions with the college advisor where can answer individual questions and provide specialized advice.
 - › Offer to take professional headshots for their LinkedIn social accounts.

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 data, 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

- **Venue:**

- Event space with plenty of tables and chairs so guests can take notes and work on their resumes.
- If you have the space, turn your office into a ‘classroom’ for the day.
- If you are a member of a private club (country club or city club), rent out a space and offer clients a private resume workshop experience. Offer all attendees a take home dinner from the club as well.

- **Extras:** Notebooks, pens, and school year planners for guests to take home.

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