

First Eagle Investments Client Engagement Series: Football Game—Getting Ready for the Fall

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?

Football Game Watch and Networking Event

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

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

Recommended Execution Strategies:

- **Attendees (two potential options):**
 - Current clients and prospects.
 - Professional referral sources.
- **Event Ideas:**
 - Option 1:
 - › Take top clients to a football game.
 - Option 2:
 - › Host screening event where clients can watch a game.
 - › Choose event space with large screens so clients can watch a game (Dave & Buster's, Top Golf, Buffalo Wild Wings, etc.).
 - › If you have the space, turn your office into a screening 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 game 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:** Stadium food and drink.
- **Extras:** Raffle tickets to future games in the area (advisor can be in attendance as another business building opportunity), football stress 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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