



Creating Exceptional Events for Clients & Prospects



J William Chettle
Head of Client Experience
and Advisor Services



Andrea Loin
Chief of Business
Innovation

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Agenda

- The Facts
- Logistics
- Ideas for Events

The Facts

Key Stats

- **97%** of marketers say in-person events are crucial
- **93%** believe events provide valuable opportunity to form in-person connections
- **93%** feel that providing an event experience personalized to attendees' interests is important
- **60%** of business leaders believe that events are critical for company success

Your Real Competitors

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Communications Strategy

Events Should Play a Role



12

touch points



4

conversations



1

meeting



1

event
invitation

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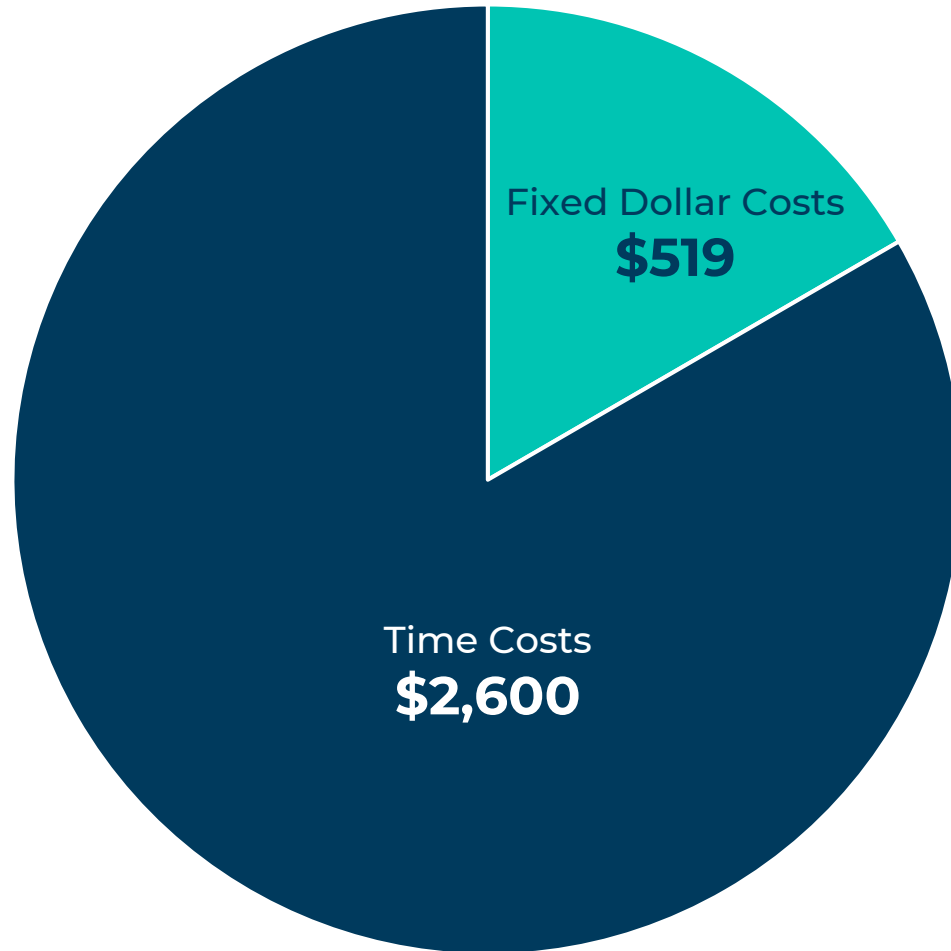
Many Advisors Hold Events

Marketing Strategy	% of Advisors Using
Client Referrals	93%
COIs	60%
Networking	47%
Social Media	42%
Client Appreciation	36%
Website	31%
Blogging	30%
Education Events	29%
Seminars	26%
Firm Brochure	26%
Drip Marketing	24%
SEO	22%
Videos	12%
Paid Websites	11%
Online Ads	10%
Marketing Consultant	10%
Direct Mail	9%
Paid Advertising	8%
Webinars	8%
Book	7%
Solicitors	7%
Podcasts	7%
Radio	5%
Custodial Referrals	5%
Marketing Lists	3%

36%

29%

Average Client Acquisition Cost = \$3,119



Fixed Dollar Costs	\$519
Time Costs	\$2,600
<hr/>	
Client Acquisition Cost	\$3,119

Source: *The Most Efficient Financial Advisor Marketing Strategies And The True Cost To Acquire A Client*, Kitces.com, 2020

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An Efficient/Profitable Marketing Strategy



Measured by
Additional Revenue
for each \$1 Spent

\$5399 in annual revenues

\$9871 in annual revenues

Marketing Strategy	Median Marketing Efficiency	Avg. Rev/Client
Client Referrals	4.7	\$8,953
SEO	3.4	\$1,192
COIs	3.0	\$15,737
Marketing Lists	2.8	\$4,615
Paid Web Listing	1.5	\$5,491
Online Ads	1.4	\$2,774
Seminars	1.3	\$2,702
Radio	1.2	\$4,378
Education Events	1.2	\$5,399
Solicitors	1.2	\$2,850
Paid Advertising	1.0	\$1,565
Podcasts	0.7	\$2,223
Networking	0.6	\$3,286
Website	0.4	\$2,100
Book	0.4	\$409
Client Appreciation	0.4	\$9,871
Direct Mail	0.2	\$2,012
Videos	0.1	\$2,594
Webinars	0.1	\$2,593
Firm Brochure	0.0	\$6,887
Social Media	0.0	\$1,713
Blogging	0.0	\$1,050
Drip Marketing	0.0	\$2,627
Marketing Consultant	0.0	\$5,235

Source:
The Most Efficient Financial Advisor Marketing Strategies
And The True Cost To Acquire A Client, Kitces.com, 2020

Closing the Referral Gap

“Over the past 12 months, how many people have you referred to your Advisor?”

PRACTICE WITH 100 CLIENTS



Source: Dimensional Fund Advisor 2017 Investor Survey

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Yet....

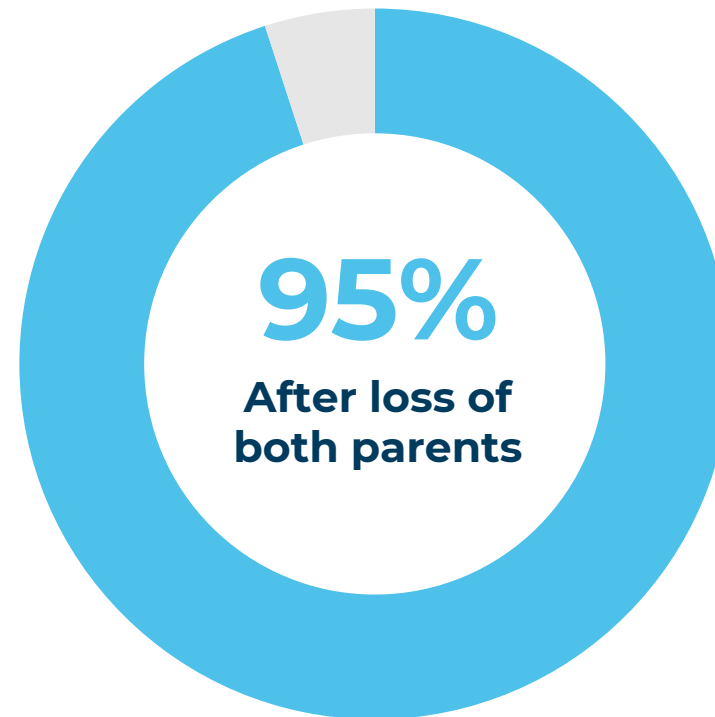
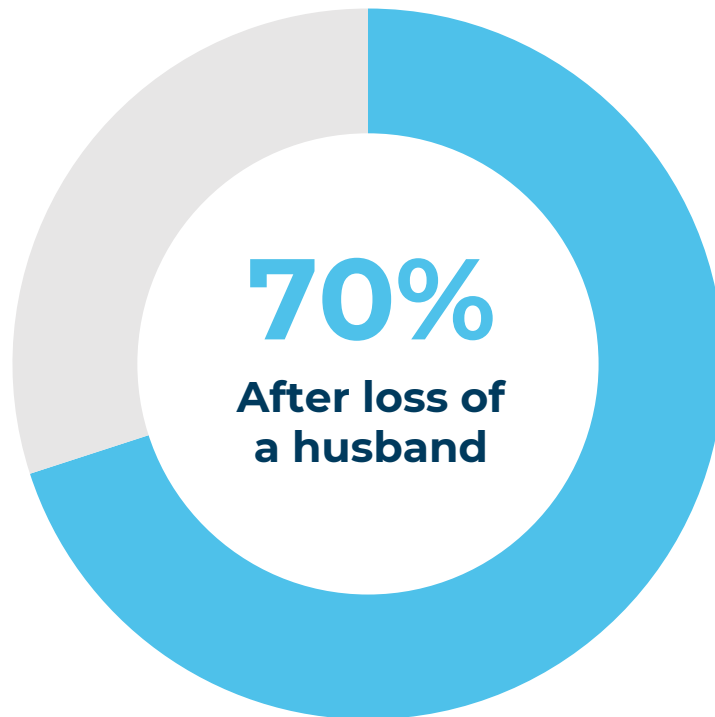
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75% of Advisors
Have No Referral Strategy

Source: Dimensional Fund Advisor 2019 Benchmarking Study

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Likelihood Inheritor Will Change Advisors



Sources: Kristan Wojnar and Chuck Meek, 2011. Women's views of wealth and the planning process: It's their values that matter, not just their value. Advisor Perspectives 5(9). Diane Doolin, Vic Preisser, and Roy Williams, 2011. Engaging and retaining families. Investments & Wealth Monitor 26(5):10-12, 16.

And Death Isn't the Only Problem...

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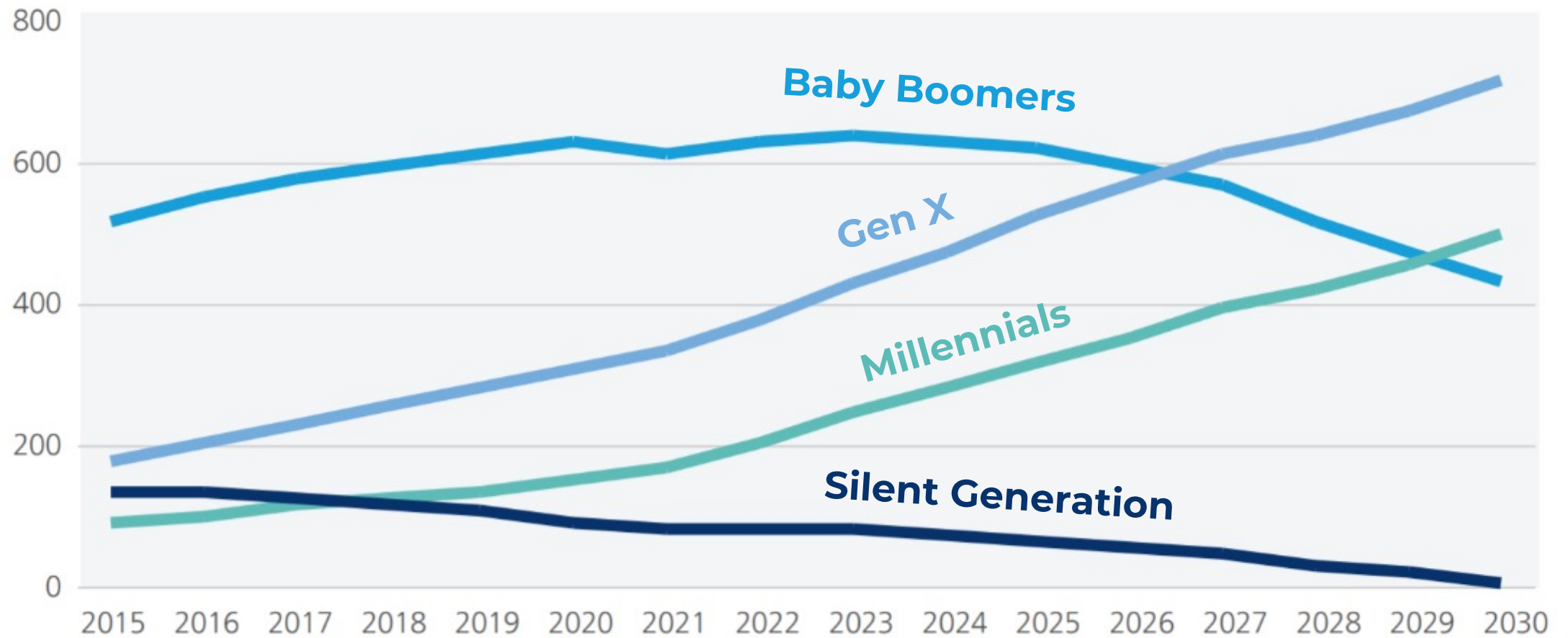
Only **13%** of affluent investors
work with the same financial
professional as their parents

Source: Cerulli Associates, U.S. Retail Investor Edition 2Q 2019.

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The \$30+ Trillion Opportunity

Forecast Bequests, by Generations (\$ billion)



Source: Source: Deloitte Center for Financial Services 2015

The Power of Events

Affluent Investors Who...

Had a social lunch	65% referred*
Did something socially	59% referred
Worked alongside advisor in charitable efforts	59% referred
Engaged in hobbies or activities with advisor	56% referred
Were invited to advisor's home for dinner	52% referred
Met advisor's spouse	45% referred
Share a common interest or hobby with advisor	44% referred
Went to a social event hosted by advisor	42% referred

*At least 1 introduction/referral was given in the past 12 months

Source: Oeschli 2016 Affluent Investor Survey

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Logistics

- **Attendees & Event:** Determine your “what” and your “who” (target audience)
- **When:** Depending on the event, Thursday evening is best (Wednesday evenings are next best choice)
- **Best Times:** Between 5:00 and 7:00 p.m
- **Preparation:** For planning ahead, think six to eight weeks.
- **Invitations: 2 invitation max. One two weeks prior to the event.**
- **Send 2 RSVPs:** Two weeks before and day before event
- **Phone Calls:** If you’re looking to increase attendance, pick up the phone
- **Frequency:** It’s important to regularly host events—especially those that focused on client experience
- **Get Help** It’s almost impossible to run an event and be part of it.

Connect to a Charity

- Hosting a charity event or fundraiser **shows what you care about**—may align with your clients' preferred causes
- Consider adding charitable component to events
 - Toy drive
 - Food drive

Tickets!!!

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**Tickets are essential
to get clients to
bring guests**

Ideas for Events

3 Types of Events

With Potential for Overlap

1. Client Appreciation

- Opportunity to build loyalty w/ clients & remind them of value you provide
- Focus on enjoyment and entertainment exclusively—no business content

2. Education

- Provide insight on important topics such as estate planning, tax management, education funding, retirement
- Present info yourself to highlight expertise or invite guest speaker, such as COI
- Consider adding educational component to “fun” client appreciation events

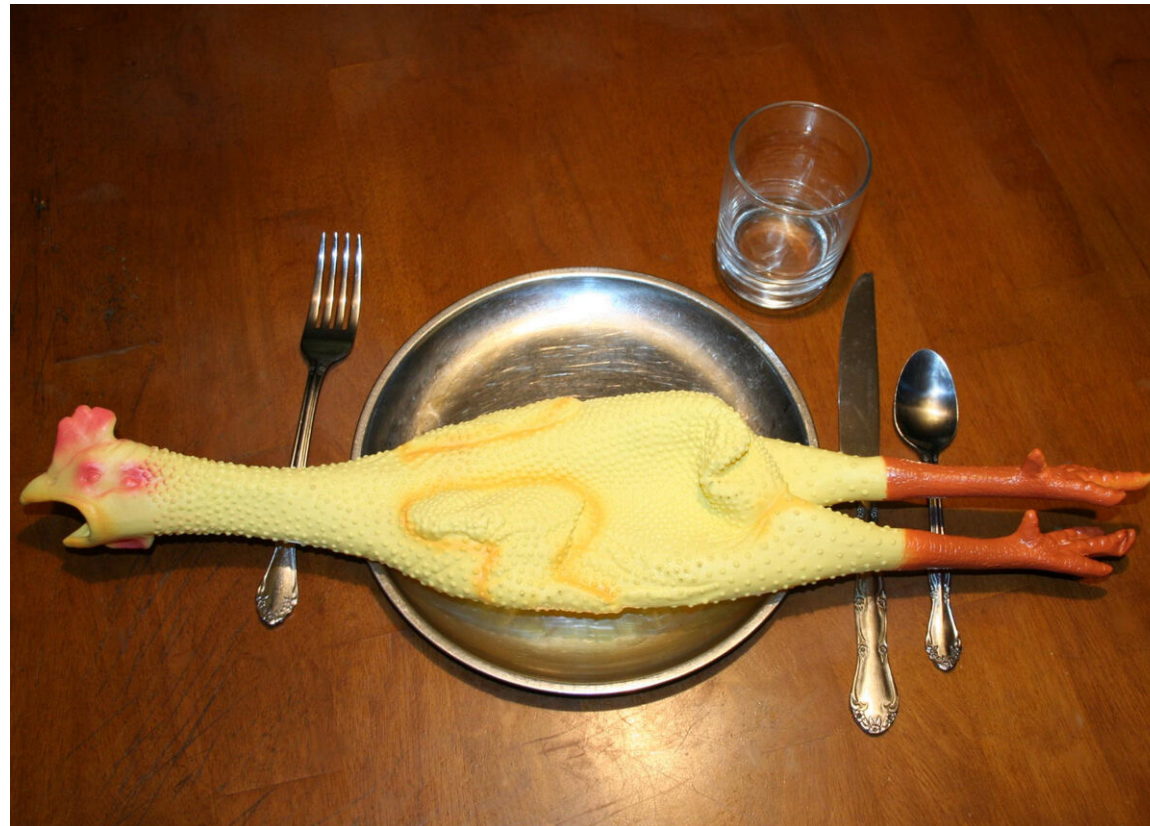
3. Prospecting

- Opportunity to showcase your value to people outside your network
- Need to be held regularly
- Tracking analytics crucial: attendance, appointments, spend & ultimately ROI

Rule #1

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Don't be boring



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Social/Appreciation Event Ideas

- Are there events clients would like to attend but logistics are too complicated (i.e. Cherry Blossom Festival)?
- Seasonal events which could become annual (e.g., viewing holiday lights, apple picking, beach- or lake-side cookout)
- Cater a dinner party at your home
- Rent theater for a movie morning (Saturday mornings very inexpensive)
- Hire a photographer to give Smartphone photography lessons
- Invite clients and prospects for a round of golf/golf tournament
- Scoop for a cause with an ice cream social and food drive
- Milestone birthdays or other significant occasions (retirement parties)

Ask your Clients

Educational Event Ideas

- Wealth & Family
- Creating a Better Retirement
- Money and Millennials
- Adult Ed at local school or library
- Partner with COI (tax strategies, estate planning fundamentals, Symmetry)
- Partner with untraditional COI (Finance & Fashion, Financial and Physical Wellness, Food & Finance, Wine & Wealth)

Ask your Clients

More Timely Event Ideas

Host a Health Care-Related Event:

- Partner with local Alzheimer's chapter
- Health & wellness event with a fitness professional

Host a Cyber Fraud-Related Event:

- Cyber security workshop
- Navigating social media privacy

Introduce Financial Literacy to Kids:

- Create plans with parents
- Host budgeting workshop

Mitigating Risks for Small Business Owners:

- Cyber fraud training
- Employee benefits that can help during the pandemic

Charitable Action:

- Philanthropic tax strategies
- How to engage with non-profits (outside of giving)

Follow Up

- Take photos and share them with clients/prospects, even send a printed, framed copy
- Other follow up gifts tied to event
- Post photos/event info on social media, feature in newsletter
- Consider Events/Past Events page on your website
- Written thank you, summarizing the event and some key takeaways
- Call every attendee and thank them for coming

**People will forget what you said,
people will forget what you did,
but people will never forget
how you made them feel.**

— MAYA ANGELOU



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Thank You



“Scrappy,” the Symmetry bull is a symbol of our firm’s belief in the long-term power of markets.

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