

By having a personal connection with your clients and prospects, you can expect:

- ✔ Your clients have a reason to talk about you and you become the trusted advisor instead of the salesperson (gossip column in the newsletter).
- ✔ Decreased marketing costs to the random public (more referrals).
- ✔ The clients learn more about your assistant and feel comfortable having them help instead of needing you (newsletter gossip).

Your clients will also begin feeling warm and fuzzy about you.....

- ✔ Relationships and friendships with other clients through you (events and charity functions).
- ✔ Up-to-date on office happenings, activities and charity events (activity calendar).
- ✔ Interesting, helpful and consistent correspondence they want to open (item of value).
- ✔ Something to talk about with your assistant and you when they see you (newsletter gossip).
- ✔ A non-obtrusive way to introduce you to their friends and family while helping you (event or party open to friends and family).

So, as the economy recovers will you be thriving or floundering? Those practices that connect with their clients will most certainly rise to the top by capturing the ones that are looking for a new advisor.

Now is the time to make sure you're doing everything you can to connect with your clients -- if you don't, someone else will.

The Monthly Client Connection Program

Here's what you'll receive in your email inbox on the 1st Monday of each and every month.



The Newsletter

Overview: Created with the advisor/assistant in mind, it is sent in Microsoft Word format for ease of modification. It contains three main articles: 1) Introduction Article, 2) Industry Article, 3) Lifestyle Article. The 4th section is blank for the advisor and assistant to write their own gossip column.

Frequency: Mailed to everyone in your database monthly during the same week of each month (i.e. 1st week of every month).



The Activity Calendar

Overview: A one page, one month calendar that contains all the upcoming holidays and other pertinent information such as time changes, market closures, IRA contribution deadlines, etc. Again, created in Microsoft Word so you and your assistant can add any additional information regarding upcoming workshops, birthdays, anniversaries, etc. Invaluable tool for advisors that travel between states.

Frequency: Monthly as an insert in your newsletter.



Client Item of Value

Overview: One of the most popular components of the program! This is normally a cover letter and an item that is of interest to your clients. Designed not to be solely financial, past months have included everything from sheets of 2 cent stamps for the postage increase to a cover letter and flyer on how to protect against identity theft. Again, the letter is in Microsoft Word for ease of mail-merges.

Frequency: Every month to only your A+ and A clients two weeks after the newsletter.



Client Party/Event

Overview: Each concept is tailored to specific groups in your database -- intimate events for your A+ clients, charity events for everyone including clients' friends and families, and client only events. We've done it all -- murder mystery dinners, fishing excursions, food pantry days, garden parties, etc. You'll receive everything you need to get the concept off the ground and ensure everyone has a great time -- including you!

Frequency: A minimum of at least once per year but we recommend hosting one at least quarterly.



Client Stop-By

Overview: What a better way to build excitement to an event than to stop-by the client's home or work and drop off items related to your event. For example, a Mardi Gras themed party would receive a gift bag filled with a feather mask and beads. There are also Stop-Bys created for a season or holiday (a tin of homemade fudge with a recipe card).

Frequency: For an event or party; to each attendee one week prior to the event. Or, quarterly to your A+ clients for those not throwing frequent parties.

WE'RE HERE TO HELP YOU.

Once you join the program, we'll help you get it off of the ground. Here's what to expect.

- ☛ Since we don't believe in spam, as soon as you enroll you'll immediately receive an opt-in email requiring your confirmation. Upon completion, you'll receive the most recent edition of the Client Connection
- ☛ If you sign-up online, you will need to create a user ID and password. This gives you complete access to the website, including past Client Connection publications, articles, tools, techniques and form letters for all areas of your practice.
- ☛ Since there are quite a few moving parts to the program, you'll receive a checklist for each part of the program explaining its purpose, how to best implement it, and options regarding each part (i.e. printing the newsletter in color versus black and white).
- ☛ A mail merge letter to send your clients prior to the start of the program. We believe building excitement about it makes it even more effective.
- ☛ For those advisors that need to obtain compliance approval, the Client Connection is always published one month in advance (January's newsletter is released December 1st).
- ☛ As a reference, you'll receive a mailing calendar on which items should be mailed to which clients during the month.
- ☛ Access to an introduction teleconference explaining the program and who's responsible for what (yes, your assistant will need a little help from you).
- ☛ In addition to the items previously mentioned, you will also receive back-office maintenance reminders (quarterly management fee reminders, market closures, etc.) and a featured tool for your office or practice each month.

So don't delay - your clients are waiting to hear from you!

Name

Company

Phone

Fax

Email

Billing Address

City

State

Zip

Payment Method (circle one)

Visa

MC

American Express

Credit Card Number

Expiration Date

CVC Code
(3 digits on back)

Signature

Date

I understand my credit will be billed the special rate of \$199 each month unless I cancel.



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OR FAX TO 866-673-4465