



CLIENT APPRECIATION EVENT

How To Keep Your Clients Talking About You & Sending Referrals Your Way

TUCKER | ADVISORS



CLIENT APPRECIATION

TABLE OF CONTENTS

STEP #1: START PLANNING

PG 4

Type of Event.....	pg 4
The Right Time	pg 5
Goals and Expectations	pg 5
Budget.....	pg 5
Venue	pg 7
Day and Time.....	pg 9
What to Serve.....	pg 9
Something to Walk Away With	pg 9

STEP #2: MARKETING

PG 9

Invite.....	pg 10
RSVPs.....	pg 10
Confirmations.....	pg 10
Branding the Event.....	pg 11

STEP #3: ORGANIZE THE EVENT

PG 11

Get Organized.....	pg 12
Set Up	pg 12
Entertainment.....	pg 12
Seating	pg 12
Agenda.....	pg 13
Help	pg 13

STEP #4: THE PRESENTATION

PG 13

What to Present.....	pg 14
Encourage Appointments	pg 14

STEP #5: THE FOLLOW - UP

PG 14

Thank You.....	pg 15
Time to Call	pg 15
Continue to Market.....	pg 15
Track It	pg 15

RESOURCES

PG 16

Timeline	pg 17
Event Ideas.....	pg 19

CLIENT APPRECIATION

A general rule of thumb states that it costs five times as much to attract a new client as it does to keep an existing one. This makes sense if you take into account all the time and money spent not only on sales and marketing, but also the staff time and paperwork required to bring on a new client.



Successfully executing this Client Appreciation Event will deepen relationships, increase the percentage of wealth you manage for clients, generate referrals, and defend against your competitors' marketing efforts.

There is no perfect formula for a Client Appreciation Event. The success will largely depend on understanding your own objectives and how well you know the preferences of your clients. To ensure that you feel your event is a success, be sure to address these six key areas:

Define your objectives – What do you hope to accomplish (referrals, goodwill, etc.)?

Select the right event – What event will draw clients?

Invite the right clients – Who should be invited (for smaller events) and how will you get them there? Pay attention to details. What needs to be planned to execute the event flawlessly?

Convey your appreciation – What do you need to say or do to make your clients feel truly valued and want to tell their network about your practice?

Follow up – What is the plan for after the event to make sure that its impact is effective?



QUICK FACTS

Costs – \$3,000-\$25,000

Plan On – Spending quality time with your clients and building rapport with their friends, family and colleagues.

What You'll Need – Time to plan and a good sense of what your client base would appreciate.

Average Cost/Lead – \$250-\$400

The Payoff – \$12,000-\$100,000* plus retaining your valued clients

* As often as we may see these results, Tucker Advisors cannot guarantee you'll experience the same. Follow this Manual closely and you will position yourself for success.

STEP #1: START PLANNING

TYPE OF EVENT

If you decide to implement a Client Appreciation Event, the next step is deciding what type of event to hold. Events can range from an intimate dinner at your home for a few of your best clients to a large lecture for all of your clients.

The type of event you should host will depend on your client base, business model, and personality. If your practice is comprised of 50 clients, several small, exclusive events would be appropriate. If your practice is comprised of 500 clients with an average account size of \$500,000, one large event for all of your clients would be appropriate. In these two examples, you would approach Client Appreciation Events very differently to meet the needs of your client demographics and business model.

Consider the goal of your event before you begin the planning process. Do you want to touch all of your clients in the most efficient way possible, or are you interested in connecting on a more personal basis? Your answer will dictate the size of your event.



If you are hesitant to spend money on Client Appreciation Events, start on a smaller scale to test their effectiveness. Host a couple of your clients to a round of golf, or invite a handful of clients to your house for a home-cooked or catered meal. Without investing too much time or money initially, you will be able to see how your clients respond to a gesture of appreciation; this will help you determine if you should implement it on a larger scale.

THE RIGHT TIME

If Client Appreciation Events have been part of your marketing strategy in the past, they are important to continue, even in down markets. If you haven't hosted Client Appreciation Events in the past, now is the time to start. There is no better time than now to tell your clients, "Thank you for working with me."

GOALS & EXPECTATIONS

Set goals and expectations for each staff member from the beginning so that you can ask yourself periodically, "Is this going to help with achieving the goal?" If you do not set goals and follow them from the beginning, how will you know if the event is a success?

BUDGET

Create a budget before you begin planning your Client Appreciation Event; it will depend on the type of event that you want to hold. The cost of an intimate catered evening at your home will be very different than throwing an event for 500 people. There may be a few items that won't be an exact cost, but as long as you know how much you want to spend overall, you'll be able to make quick and efficient decisions along the way. We recommend creating a budget in Excel that includes every item you will be spending money on, including the venue, caterer, decorations, giveaways, programs, audio visual, etc. (See sample on following page.)



EVENT DETAILS

NUMBER OF GUESTS	100				
SERVICE	Details	Estimated Cost/Item	Estimated Total	Actual Cost/Item	Actual Total
VENUE	The Perfect Location				
CATERER	Excellent Food Caterer				
TABLES/CHAIRS/LINENS/ PLATES/CUTLERY/ETC.	These will be rented by caterer and paid for by you in most cases.				
DECORATIONS	Flowers, votives, candles, banners, etc.				
LIGHTING	Lights for stage & to light up the venue				
INVITATIONS	The actual invitations that will go out to each client.				
SIGNS	One sign at entrance				
CONFIRMATION MAILER	Mailer to go with map, agenda, etc.				
PROGRAM	About company, program for night (about in-house sales team, etc.)				
NAME TAGS	Each attendee will wear a name tag.				
REFERRAL & APPOINTMENT CARDS	For each person in order to get more appointments and possible referrals.				
TRANSPORTATION/ PARKING	If the venue you choose is far from your office, will you want to provide a shuttle to get there? If not, you'll want to make sure there is parking available. If there isn't, then you may need to pay for additional spots somewhere nearby.				
AV	If the venue does not have AV equipment, you'll need to rent, (i.e., a projector, screen, audio, etc.). Either way, you'll probably have costs associated with this.				
GIVEAWAYS	Mugs, pens, etc.				
RAFFLES	Trip, cruise, TV, etc.				
ENTERTAINMENT	Band				
THANK YOUS	Thank you cards for all attendees after event.				
STAGE	Stage for front of room				
MISC	This is for any costs you weren't expecting that come while planning event.				
TOTAL ESTIMATED BUDGET					



VENUE

Again, your main goal with choosing the type of event and venue depends on what your clients enjoy and what will make them feel comfortable. The following are some things to keep in mind when selecting a venue:

ACCESS

The venue should be easy to find and convenient to get to; for example, close to a highway. Will traffic be a factor in terms of timing and access?

ENTRYWAY

Register all guests upon arrival, then check their names off, give them their name tags, and take them to their seats. Your event will start at a specific time, so you can probably expect a crowd to arrive all at once; make sure the venue entryway is large enough to hold several guests waiting in line. Also, if it's cold or rainy, make sure that the entryway can accommodate your guests, so they don't have to stand outside and wait.

DINING AREA

This space should comfortably seat all of your guests in the same room. If you have a presentation, plan on making announcements, or have entertainment, re-arrange the space as needed so that everyone has a good view. Do not overcrowd tables, and leave your prospects plenty of elbow room to enjoy their meals.

NOISE

Sound carries, and while this can be a good thing for a presentation, it could be a bad thing if there is a band echoing, or if people can't hear the presenter. Be aware of the acoustics in the room.

AUDIO VISUAL

Make sure the chosen venue can accommodate and support a presentation, entertainment, etc. If you are doing a presentation, you may need a mic and speakers, a screen and projector, spotlights, etc. Ask the venue if they recommend any AV rental companies, as some will only allow you to bring in an AV company from their preferred list.

KITCHEN

Your caterer will want to use your venue's kitchen to prepare the food. Make sure that the venue you like can accommodate this. Look for ovens, stoves, warming drawers, big sinks, etc. Again, some venues will only allow you to use caterers who are approved by them.

AMBIANCE

What kind of mood and feeling are you looking to create during your Client Appreciation Event? Make sure that the venue you select upholds the mood and message of the event.

PARKING

Make sure the venue you choose has enough parking for all of your guests. If the parking spots are far from the front door of the venue, you may want to provide valet services. Valet parking will allow you to control the line at registration, based on the speed of the valet service.

WALK THROUGH

After you finalize the venue location, schedule a walk through with the main contact, the caterer, and AV, to go through all the details of your event, and make sure everything is covered.



When you offer a raffle, include an incentive for bringing a couple. For example: “Thank you for bringing another couple, you and your spouse will now be entered into a drawing for our grand prize—a trip of your choice valued up to \$2500.”

DAY & TIME

Choosing the date of your Client Appreciation Event is one of the most important elements of your event. We suggest that you choose a Tuesday, Wednesday, or Thursday. Weekends are too busy for people, and because Mondays and Fridays open and close the week, people rarely attend an event on these days. We also suggest doing an evening event. While most of your clients are probably “seniors,” many of them are still working, and you want as many of them to attend as possible.

WHAT TO SERVE

Work with your caterer to discuss the perfect menu. You know your clients, and what they would or would not enjoy. Whatever you serve, just make sure that it is high quality. Many caterers will schedule a tasting with you before you commit to using their services, and we highly recommend doing this. The safest bet to satisfy a diverse crowd is to do a combination of chicken and beef with a vegetarian option.



SOMETHING TO WALK AWAY WITH

This can range from a small personal gift to a general item (i.e. gift card) given to all attendees. When your clients go home, you want them to be reminded of you and your event.

STEP #2: MARKETING

INVITE

The marketing used to promote your event directly correlates with your clients' attendance. Plan your event as one that you would love to attend, then make sure you take the necessary steps to make your clients feel the same way.

Invitations should be in homes 3 to 4 weeks prior to the event so that clients have plenty of time to add it to their calendars. In terms of the design elements, Tucker Advisors can help you as much or as little as you would like, from brainstorming a concept to the actual mailing of custom invitations. Contact Marketing for more information.

Include a way for your clients to RSVP in your invitations. Mail-in cards are always a nice gesture, and an excellent way to update your clients' information. If your goal is, for instance, to have most clients bring a referral to the event, then make sure you are doing everything you can to get the message out. Often we state in the invitation, "we encourage you to bring guests."

The more times you tell the client, however, the more likely it will happen. State it in your invitation and follow up with a phone call to top clients, or mention it to them when you are face-to-face. "This event is a great opportunity to bring those friends that you've wanted to introduce to us."

RSVPs

The easiest way to keep track of your guest list is by using a spreadsheet. Compile who the invitees should be, and keep track of the RSVPs that you receive; this spreadsheet will act as your guide. Always allow for last minute RSVPs or unexpected guests—have extra place settings and spare nametags on standby.

CONFIRMATIONS

Allow time and budget for a final confirmation mailer (or e-mail) to verify that your client has registered, and give them any additional information needed to attend the event (e.g. dress code, parking, etc.). This should be sent about two weeks before the event and followed up with confirmation calls. Have a member of your staff start these the week before the event. Just because you haven't received an RSVP back from a certain client does not mean they are not coming. Call everyone that you sent an invitation to.

BRANDING THE EVENT

In addition to your invitations and confirmation mailer, there are other important design elements that will help brand your event and add to a memorable evening.

WELCOME SIGNS that point to the venue or raffle and list the name of the band or entertainment can all be done within your theme and logo. This can enhance the ambiance and create a cohesive space for minimal cost.

PROGRAMS that contain information about your company and the entertainment and thank guests for coming are a nice touch and will be greatly appreciated.

NAME TAGS will help you recall your guests' names quickly, and will aid in your clients getting to know one another. They are also another way for you to reinforce your brand. Since your clients are encouraged to bring guests, and many of them will, this is a perfect opportunity for your clients to urge their guests to make an appointment with you. Leave appointment cards branded to the theme of your event on the tables prior to guest arrival, or hand them out as you walk around the tables and thank people for attending.

EXAMPLE MARKETING



TUCKER ADVISORS
Where values make value.
TUCKER ADVISORS'
CLIENT APPRECIATION EVENT 2011

Tuesday, June 21, 2011
Event at 6:00 pm
Explore the zoo starting at 4:00 pm
Denver Zoo, Conoco Zoo Gardens
Included are tickets for you and 4 guests.
Please RSVP no later than June 3rd, 2011
(No children please)

Join us for an evening of exploration, dinner, and special presentations by the DENVER ZOO.

 It all began with a special gift to the mayor of Denver, a black bear named Billy Bryan in 1896. The Denver Zoo is now one of the most popular zoos in the United States and spans 80 acres within Denver's historic City Park with more than 1.6 million visitors annually.

As a valued client of Tucker Advisors, I would like to invite you to our Client Appreciation Event, hosted at the Denver Zoo. Take this opportunity to bring two guest couples with you, shake a familiar hand, spend the summer evening mingling with the wild life, enjoy a wonderful dinner and take in the animal presentations by the Denver Zoo.

All of us at Tucker Advisors greatly appreciate your business and your referrals. We are looking forward to welcoming you to this year's appreciation event and are excited to meet any guests you may bring. Please be sure to RSVP soon so that we can save your seat for June 21st.

Sincerely,
Karlan Tucker, CEO
Tucker Advisors



ZOO TICKET
Tuesday, June 21, 2011
Event at six o'clock in the evening
Enjoy the zoo starting at four o'clock in the afternoon
Denver Zoo, Conoco Zoo Gardens
Join us for an evening of exploration, dinner, and special presentations.

ADMIT ONE 1000003



ZOO TICKET
Tuesday, June 21, 2011
Event at six o'clock in the evening
Enjoy the zoo starting at four o'clock in the afternoon
Denver Zoo, Conoco Zoo Gardens
Join us for an evening of exploration, dinner, and special presentations.

ADMIT ONE 1000001



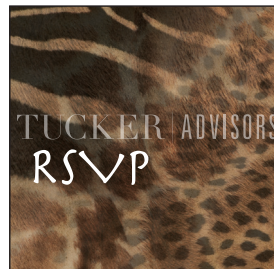
ZOO TICKET
Tuesday, June 21, 2011
Event at six o'clock in the evening
Enjoy the zoo starting at four o'clock in the afternoon
Denver Zoo, Conoco Zoo Gardens
Join us for an evening of exploration, dinner, and special presentations.

ADMIT ONE 1000002



ZOO TICKET
Tuesday, June 21, 2011
Event at six o'clock in the evening
Enjoy the zoo starting at four o'clock in the afternoon
Denver Zoo, Conoco Zoo Gardens
Join us for an evening of exploration, dinner, and special presentations.

ADMIT ONE 1000006



TUCKER ADVISORS
RSVP

☐ YES! I WILL BE ATTENDING TUCKER ADVISORS' CLIENT APPRECIATION EVENT

Client Name: _____
Spouse Name: _____
Phone Number: _____
Email Address: _____
Client Address: _____
Meal Allergies: _____

Guest Name: _____
Spouse Name: _____
Phone Number: _____
Email Address: _____
Guest Address: _____
Meal Allergies: _____



TUCKER ADVISORS
OUR THANK YOU

TUCKER ADVISORS
CLIENT APPRECIATION RAFFLE

 Vancouver Island Rainforest, BC	 The Action: Three Squares, NYC
 Natural Beauty: Vancouver Whistler, BC	 The Perfect Catch: Victoria Island
 The Beach: Laguna Beach, California	 The Greatest Outdoors: Jackson Hole, Wyoming
 Your History: Boston, Massachusetts	 A Maine Event: Kennebunkport, Maine
 Summer of Love: Lake Charlevoix, Michigan	 Rattle Up: Scottsdale, Arizona

By attending, you and your spouse will be entered into a drawing for our grand prize - a trip of your choice valued up to \$2000.00. For each couple you bring as your guests as an introduction to Tucker Advisors Group, you will receive an additional entry and your guest will receive an entry as well.
(Must be present to win.)

DENVER ZOO CLIENT EVENT — INVITE, TICKETS, RSVP & THANK YOU

Review a variety of themes and color palettes to make sure that the style of your invites matches the feel of your event.

STEP #3: ORGANIZING THE EVENT

GET ORGANIZED

Get the details of the event out of your head and into an agenda. This will outline the specifics of the event so that nothing is missed. Anyone in charge of making sure that the event runs smoothly should have access to this agenda. It should follow a detailed timeline, with speaker and entertainment names (if applicable). Along with the agenda, you should have a couple of binders at the event that include the registration list, copies of each contract, contact information for all vendors and people helping run the event, a general event agenda, and anything else you can think of that you might need to have during the event.

SET UP

Arrive to set up for your event a minimum of two hours before the event. Again, the unexpected will happen; so, the best thing you can do is to give yourself enough time to deal with it. When preparing the agenda, approximate how much time each piece will take you to prepare, then add an hour.

ENTERTAINMENT

The primary focus of this event is to show appreciation to your clients for their business. So, unlike a seminar that is just a presentation, adding some sort of entertainment creates a more “event” type of feel. Your event entertainment can range from comedians, musicians, improv, or anything that you think will speak to your clients, and contribute to the theme and feel of your event.

SEATING

Seating can be assigned or not. A seating chart makes the event more structured and provides a way to introduce old clients to new ones. Another option would be to seat as we do at seminars or as a restaurant would: someone acts as the host, and seats according to the number of reservations, with others showing them to their seats. If you want a more relaxed atmosphere, allow people to seat themselves and arrange your tables in a way that will facilitate conversation and fun.



Add a special touch to the already-existing décor to make it look even better than it currently does. For example, candles and flowers are a good addition to dinner settings.

CLIENT APPRECIATION

AGENDA

The ultimate goal is to host an event that runs smoothly, entertains your guests, and benefits your business. Create an agenda to ensure success. Give guests time to arrive and register, and accommodate those who are running late. During registration, we suggest that you give yourself time to mingle, so those guests who have already made it through the registration process have a chance to talk with you and amongst themselves. Stick to your schedule. If there's time for dancing, a show, raffles, etc., make sure you allocate time for that in the agenda as well.

HELP

Your job during this event is to mingle with your clients. This is your opportunity to make your clients feel good about their relationship with you, so they in turn can refer their family and friends to you. Even if your goal is to create a very intimate feel, with you cooking dinner for your best clients, we would still recommend the help of at least two people so that your guests feel spoiled. For events with over 100 guests, contact Tucker Advisors' Marketing Team to see how we can assist you with the event details.



At your Client Appreciation Event, have your top referring client arrive in a limousine. When you make your remarks to the group at the event, recognize this client. "I'd like to ask Mrs. Smith to please stand. Many of you may have seen Mrs. Smith arrive in a limo tonight. We had her brought here in a limo because she has so graciously referred 15 people to our firm this year! Thank you, thank you!" Now, without asking for referrals, all the attendees will know how much you appreciate and would like referrals. Simple but effective in getting post-event referrals!

STEP #4: THE PRESENTATION

WHAT TO PRESENT

Presentations should be kept to a minimum in order to keep the “event” feel. You can, however, make a short 15 to 25 minute speech about how much you appreciate your clients’ trust, making references to what you do in order to capture their referrals’ attention. In the end, your guests should know that they made a great choice by placing their retirement money with you.

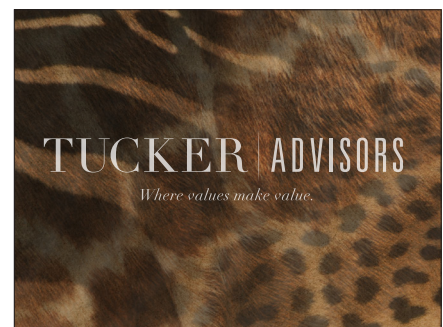
Place a company brochure at their seats when they arrive, but do not make that information the focus of this event. The focus of the event is to thank the clients, not make a sales pitch.

When it comes to getting appointments and referrals, ask for help! Ask for it in a way that is comfortable for you and your client base. An example would be, “Thank you all for letting me be a part of your lives and helping you secure your retirement. If you can think of anyone who could benefit from that same peace of mind, please send them my way. If you are not one of my clients yet, I’d love to set up a time to meet.”

ENCOURAGE APPOINTMENTS

Offer a raffle during the event for attendees. If a client brought a referral, they should receive an additional entry into the drawing for every couple that they brought, and if the referral schedules an appointment they get an additional entry into the drawing. Implement a system for collecting the appointment cards and raffle tickets.

The raffle prizes can be as extravagant as a trip, or as minimal as a night out on the town, with tickets to a show and dinner at an upscale restaurant. It needs to be advertised from the beginning on your invitations.



REQUEST FOR INFORMATION	
<input type="checkbox"/>	Yes, I would like to schedule an appointment
Names: _____	
Phone Number: _____	
Address: _____	
Requested Day & Time of Appointment: _____	
<i>Thank you for attending!</i>	

STEP #5: THE FOLLOW-UP

THANK YOU

Handwrite a personal thank-you note to each couple who attended. If you are writing to a referral, be sure to mention the name of the client who brought them, and thank them for their time. Do not ask for appointments at this point. These need to be sent out within a day or two of the event, so make this a primary focus right after, or get a head start on them prior to the event date.



TIME TO CALL

Within those first few days post-event, try to make phone calls to all of the attendees with a thank you and follow up on a conversation you had at the event. For example, if you talked about fishing, be sure to mention it again. Most people will automatically say that they need to come in for an appointment; but if they do not, then feel free to invite them in for a review of their accounts. If they are a referral, let them know that you would be happy to offer them the same “Second Opinion” appointment their friends had.

CONTINUE TO MARKET

If the person who attended the event is a client or will be soon, do not make this the only time you contact them throughout the year. Birthday cards should be automatically sent (handwritten, of course), annual reviews are a must, and if there is something that happens in the market or a change in your practice, be sure to contact them. They should also receive any newsletters or e-mails that go out to your database. If the prospect decides that now is not the right time, add them to your lead database and continue to drip on them. If a situation arises, make sure that they remember you and your practice.

TRACK IT

Track the number of referrals that attended the event and compare that to the number that booked an appointment. Use this information to jump-start ideas on getting both of those numbers up for the next event to make it even more of a success.



THE RESULTS

Client loyalty, an increase in clients' managed assets, a personal introduction to qualified referrals, and a great time! Depending on the size of your event and the number of referrals, you could gain \$12,000+ in commissions. This could be an annual addition to your income, so keep it up!

** This Manual and other marketing ideas are provided by Tucker Advisors as general concepts and do not necessarily comply with your state's regulations. Tucker Advisors has made an effort to provide ideas that are generally in compliance with state regulations, but you should always make sure that you are in compliance with your particular state.*

TIMELINE

CREATE A PLAN AND DECIDE ON THE FOLLOWING:

Date and Time of Event

Budget

DECIDE WHAT YOU WANT TO DO FOR THE FOLLOWING:

Agenda

Giveaways/Raffles

Marketing

Decorations

Reservations

FINAL PLANNING INCLUDES:

Detailed Agenda

Binder

Checks/Cash

RESEARCH & SECURE THE FOLLOWING VENDORS:

Venue

Caterer

Transportation/Parking

Entertainment

Guest Speaker

PLAN THE DETAILS OF THE EVENT, INCLUDING:

Seating Chart and Room Diagram

Caterer

Venue

Marketing

Event Assistance

Presentation

Set Up and Tear Down

EVENT IDEAS

THE COUNTRY CLUB

Offer your best clients and employees a luxurious day at a local country club complete with fine dining, dancing, swimming in a heated pool, limited spa services, golf and tennis instruction, and many other amenities. Spending a pampered day at your country club is sure to boost your clients' opinion of you and gives you an opportunity to meet others that may be able to use your services. Have a hot and cold buffet with all the trimmings and provide a grab bag filled with gifts of distinction.

BOWL-A-THON

Bring your clients back to the simpler days of their youth by organizing a bowl-a-thon. In a bowling alley, your clients can kick back in their casual clothes and have old-fashioned fun. Include music in the background, a tasty buffet, attractive prizes for the best bowlers, and cool consolation prizes for the bowlers who didn't score as well.

BOAT CRUISE

Rent a yacht for the afternoon or evening and invite all your clients aboard for the most elegant time of their lives. Have the yacht take a scenic cruise of the local area so your clients can enjoy a pleasurable neighborhood boat ride. Serve a gourmet buffet that includes seafood. Include nautical decorations throughout the yacht and have a low-key band with dancing for an ultimate water excursion your clients are sure to remember.

HOLIDAY HUNT

Start at a local park and have your clients hunt for various prizes that are fun, festive, and valuable. After a romp in the woods, invite everyone to a hearty buffet dinner at a country inn that serves old-fashioned meals and delectable desserts. Include festive music and dancing for a down-home party atmosphere that will leave everyone feeling warm and cozy.

MAGICAL EVENT

Enjoy a magical holiday with your clients by having a party with magicians. Rent a hall with a stage and have one magician perform a show onstage, a second magician perform table magic and a third magician do balloon art and interactive tricks. While the show continues throughout the party, serve a three-course meal with all the trimmings and flavored coffees. Your clients will leave feeling impressed and entertained after a magical evening.

MOVIE SCREENING

The excitement of Hollywood is always a great premise for a memorable event. Invite your clients to a movie screening of a classic like *Gone with the Wind* and include popcorn, bonbons, and soft drinks during the film for old-fashioned fun. After the screening, have a reception at the theater with a sumptuous buffet and an animated, interactive game of movie trivia with prizes for everyone.

SOUP KITCHEN HOLIDAY EVENT

Share the spirit of the holidays with your clients by having a holiday soup kitchen party where everyone can give back to the community together. By making soup and sharing your services with those less fortunate, you can all celebrate sharing during the holiday season. Everyone can prepare delicious dishes and share them with the soup kitchen visitors. Decorate the soup kitchen for a festive flair. All your clients will feel so much better about themselves after your charitable soup kitchen holiday event.



OPERA

The opera is a classy, festive way to thank your clients after a busy year. Take your clients to your local opera, then have a reception after the performance with an elegant buffet. End the party with a holiday sing-along, hot cocoa, and festive desserts for an event that will leave all your clients singing your praises.

MYSTERY DINNER

Invite your clients to a mystery dinner. Traditional dinner theater gets a new twist with a story line that gets all your guests involved. Consider having the dinner at an interesting location, such as a local mansion, to add to the fun. The excitement of "who dunnit" coupled with great food and desserts will give your clients unusual fun they are sure to talk about with everyone they know.

CONSERVATION AT THE ZOO

You can either have your party at a local zoo or invite an animal trainer to bring the zoo to your location. Invite your clients and their families for a fun day at the zoo. Include exhibits and interactive experiences with the animals for a memorable time. You can either have a more elegant feel with dinner and performances or a relaxed feel with burgers and ice cream. This is a great venue for all sizes of groups, and all of the guests will want a picture to remember their wild time.

CIRCUS

Everyone loves a clown, and your clients will love to be kids once more at your circus. Have circus performers and a clown come to the venue that you choose. Encourage your clients to bring their families to join in the festivities. Serve circus foods such as hot dogs, burgers, sausages, cotton candy and popcorn with soda. Have the clown do festive balloon figures and face painting. Serve cupcakes, mini pies, and ice cream for dessert with coffee, tea, and hot cocoa. If you can get a monkey to come with the circus, it's an extra fun bonus for your clients and their families.



HAWAIIAN LUAU

Bring the summery feel of the islands to your event by having a luau. Have everyone wear a Hawaiian shirt and give them a lei when they arrive. Serve tropical drinks with fake palm trees and Hawaiian music. Have a hula dancer visit the party for a really authentic Hawaiian feel. Consider a pig roast or a traditional Hawaiian buffet that includes tasty island desserts. Your clients will feel like they had a Hawaiian vacation after your event.

GOLF EXCURSION

Take your clients golfing at an indoor or outdoor golf course, depending on your location. Give out company golf tees and company golf balls and offer novelty golf gifts for the best players. Include a putting area where people can practice their putting if they prefer not to play a full game of golf. Serve an enticing buffet at the clubhouse.

DOWN THE RIVER

River rafting is an exciting, once-in-a-lifetime way to show how much you appreciate your clients. Hold an adventurous excursion going river rafting past spruce trees and smell the fresh aroma of pine as you race through the rushing water. When you return, have a hearty, hot buffet ready in a cabin atmosphere. Serve hot beverages such as gourmet coffee and cocoa to warm everyone up. Your clients will remember going down the river with you for many years to come. Top it off with a unique gift or two from the Starbucks® store.

HIKE

Invite your clients for a hike through the woods. You can even have an informal scavenger hunt for fun goodies during the event, but be sure to clean up the woods afterwards. The hike can end at a cozy cottage or cabin with a hearty buffet and hot and cold beverages waiting for the hungry hikers.

AT THE RACES

If your clients enjoy a day at the races, organize a Client Appreciation Event with the horses. You can hold the event at a local racetrack or at a local off-track facility with a hall. Find one of the off-track facilities that offer posh lounges with incredible buffets. Give out novelty prizes with the racing theme to all your clients when they arrive.

LORDS AND LADIES

Rent the local manor house and hold a lord and ladies party for your clients. All your clients must dress in the historical apparel of lords and ladies, including bustle skirts and tuxedos with tails and top hats. Serve an elegant meal and have era-appropriate music, dancing and card playing after dessert. A local library or museum are also excellent locations.

JUKEBOX NIGHT

Have a jukebox night with your clients by holding a fun, festive fifties bash. Tell everyone to wear fifties outfits and put on their dancing penny loafers. Rent a jukebox and play fifties songs. Set up fifties-style booths or tables with stools for a retro atmosphere. You can even organize an animated game of fifties trivia with novelty prizes. Serve milk shakes, burgers, french fries, egg creams, and standard fifties diner fare.

FIREWORKS DISPLAY

Have the event at a pier or field with a festive fireworks display. Hire a local fireworks organizer and have them set off a colorful, stellar display while serving traditional summer foods.

BALLOON RIDES

Take a few of your most valued clients up, up and away in your beautiful balloon for a trip they will never forget. Hire a hot air balloon to take your clients for an incredible ride in the sky with memorable vistas of the local area. Have a lunch waiting for everyone when they touch back down.

HELICOPTER TOUR

Although a bit pricey, your important clients will never forget a helicopter tour of the local area. Meet at the local airport and serve finger foods during the journey, as you get a bird's-eye view of the area. When you land, have dinner at a local restaurant.

CONTACT TUCKER ADVISORS TO LEARN MORE ABOUT HOW WE CAN HELP YOU

PHONE Toll Free: 800. 734. 0076
Local: 303. 734. 1234
Fax: 303. 565. 1459

ADDRESS Tucker Advisors
1520 W Canal Court
Suite 100
Littleton, CO 80120

E-mail info@TuckerAdvisors.com

WEBSITE www.TuckerAdvisors.com