



4 Reasons Every Wealth Manager Should Give Client Gifts

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As is the case in many industries — but especially within wealth management services — having a strong client network is integral to the success of your business. Because of the nature of wealth management work, the ideal client tends to be more discerning of the people they work alongside, socialize with and entrust their money to. Simply put, these people want to work with advisors who make them a priority.

With heightened standards in mind, finding ways throughout the year to remind clients of the value you bring can spell the difference between a fast-fizzled engagement and a thriving, long-term partnership. And as for new opportunities? Well, the same can be said for getting your foot in the door with prospective clients, too.

The Benefits of Client Gifting

Sending quality gifts is one of the best ways to strengthen and create connections with valuable contacts. Whether you're trying to solidify current partnerships or you're reaching out to new prospects, gifting offers a solution that rewards your effort in a variety of ways. Here are four of the biggest benefits you can expect from sending your partners an unexpected gift this season.

1. Stay Top of Mind

With “banner blindness” and ad exhaustion seemingly stronger during busy shopping seasons, having a way to subtly remind people of who you are and the services you offer is invaluable. With gifting, you have a great tactic for keeping your name in front of clients and prospects in a way they'll actually appreciate. After all, no one is hitting the skip button on a fresh box of pralines.

2. Emphasize Your Client's Value

Remember, your clients know their own worth. They want to work with someone who recognizes it, too. By sending them quality gifts — no matter the time of the year — you are illustrating how important they are to your business. If you're willing to put forth this type of effort to recognize them individually, you're likely working very hard on their financial behalf as well.



3. Reward and Encourage Loyalty

There just can't be enough said of clients who stick by your side. With a market chocked full of competitors, loyalty is harder to come by these days — so you should reward it when you can. Consider creating gifting tiers for your current pool of clients, and send upgraded gifts to those who stay with you longer. This makes long-term partners feel appreciated for their commitment and trust in your expertise.

4. Expand Your Reach

Don't limit yourself to just current clients. Gifting can also be leveraged to establish connections with prospects, too. A thoughtful token or shareable box of treats with a warm greeting shows initiative and willingness to go the extra mile — two attributes that raise the stock of any wealth advisor. Plus, if you time your gifts right, they can help trigger an influx of new work just when you need it.



TASTEFUL TIP

The holidays aren't the only time of year when giving a gift makes an impact on your clients. There are many reasons and opportunities to show your appreciation throughout the year. Birthdays, client anniversaries, retirements, celebrating the birth of a child, new client onboarding and saying thanks are just a few great gifting occasions.



Stand Out This Season

At Cane River Pecan Company, we understand that making a big impression on your most valuable contacts is important. That's why we make corporate gift fulfillment simple and stress-free. From gift selection to customization and order support, our specialists can help you every step of the way to find the ideal pecan gifts and unique Southern specialties to delight everyone on your list this year.

Visit our website to learn more or **call 1.800.692.3109** to get started.

