

SAMPLE CLIENT RETENTION PROGRAM

A Level Clients Profile:

Jane and Bob are A list clients in their late 40's with two children in high school.

Bob enjoys playing golf and he is an LA Hockey fan. He owns a mid sized printing company. Jane and Bob enjoy travelling internationally.

Jane is an office manager and an avid reader.

Their daughter is in 11th grade and enjoys playing volleyball while their son is in 10th grade and plays in a band.

Their biggest concerns are their children getting into a good college and saving for their retirement.



JANUARY

Email One: New Year's Resolutions
Article on starting the year off right – financially

Email Two:
Article about the most exotic places to travel this year



FEBRUARY

Email One:
9 things you didn't know were tax deductible

Email Two:
Article on best places to retire in the next 10 years

Gift for Spot, the family dog
Basket of treats, jar, and toys, including LA hockey toy



MARCH

Handwritten note and the *North of Beautiful* book by Justina Chen sent in the mail for Jane to read:



APRIL

Email One: Email on latest drone technology

Email Two:
Email on tips for getting better travel deals



MAY

Email One:
Email with best hidden golf courses for Bob

Birthday card for Bob with gift:
Private chef preparing dinner in their home

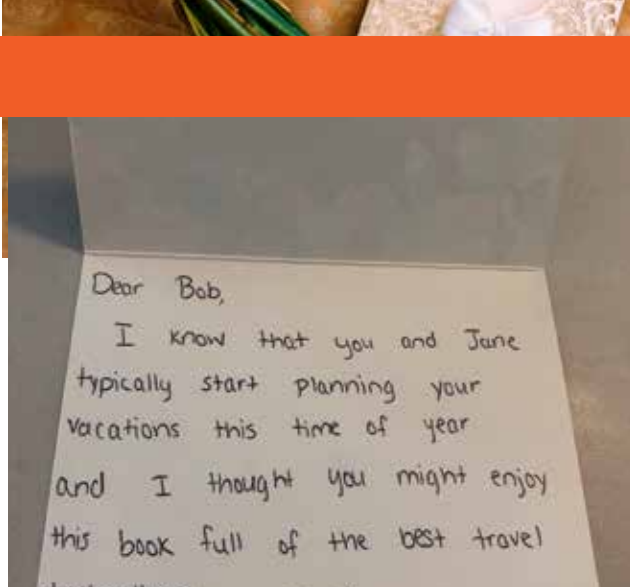


JUNE

Birthday card for son with iTunes gift card for \$25

Email One:
Article about 17 Refreshing Books To Read This Summer

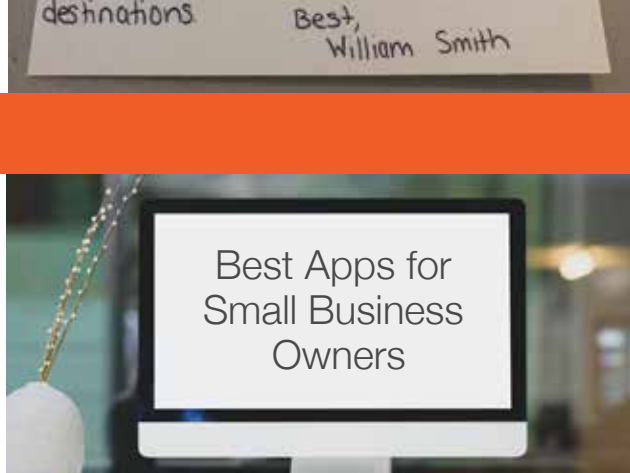
Article Two:
Article in the mail on travel destinations with handwritten note about places to visit this summer



JULY

Email One:
Link to article on how to prepare kids for college

Article Two:
Apps every business owner should know about



AUGUST

Email One:
4 Ways Managers Can Empower Their Team Article

Email Two:
Top tips for business owners for happier employees Article

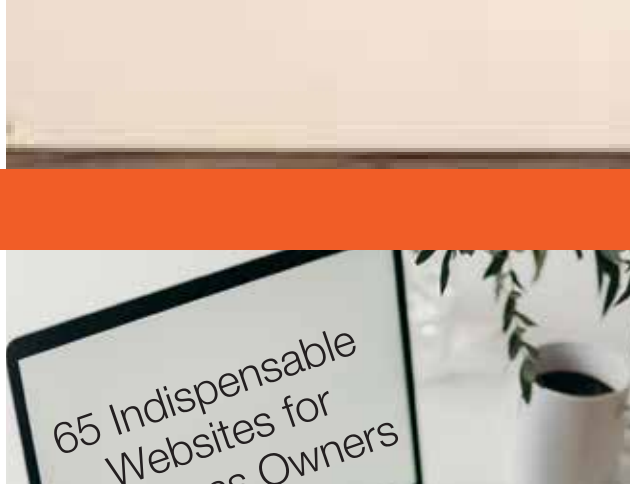
Birthday gift for Jane:
Deluxe succulent garden



SEPTEMBER

Email One:
Link to NPR podcast on travel to Peru

Email Two:
Article on 65 Indispensable Websites for Business Owners



OCTOBER

Email One:
Article on Trusts and Estate Planning

Email Two:
Podcast to "marketing school" from Entrepreneur.com

October gift:
Personalized leather passport, and luggage tag for the family's upcoming vacation



NOVEMBER

Article One:
How to give back to society – list of charities you can do with your kids

Email Two:
Best thanksgiving dishes email



DECEMBER

Email One:
Emotional vs purposeful investing

Article:
Year End tax saving tips

Happy Holidays card for the family



GET UP AND RUNNING IN NO TIME
WITH OUR PROGRAM TO INCREASE
CLIENT RETENTION

CLIENTPORTER.COM/HOW-IT-WORKS/

INFO@CLIENTPORTER.COM