

# 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.

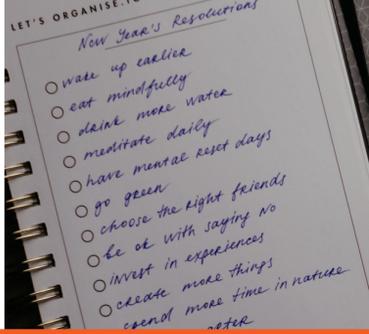
Jane is an office manager and an avid reader.

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

**Article:**  
*New Year's Resolutions: Starting The Year Off Right - Financially* sent via mail



## FEBRUARY

**Article:**  
*9 Things You Didn't Know Were Tax Deductible* sent via mail

**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

**Article:**  
*Latest Drone Technology* sent via mail



## MAY

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



## JUNE

**Article:**  
*Top 5 Travel Destinations to Visit This Summer* sent via mail



## JULY

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



## AUGUST

**Article:**  
*4 Ways Managers Can Empower their Team* sent via mail

**Family Movie Night Package:**  
100 Best Movies Scratch Off Poster and Gourmet Snacks



## SEPTEMBER

**Article:**  
*65 Indispensable Websites for Business Owners* sent via mail



## OCTOBER

**Article:**  
*What You Need To Know about Trusts and Estate Planning* sent via mail

**Gift:**  
Personalized leather passport, and luggage tag for the family's upcoming vacation



## NOVEMBER

**Article:**  
*How to give back to society – list of charities you can do with your kids* sent via mail

**Birthday Gift for Jane:**  
Custom scented candle with matchbox and "Raising the Barre" by Lauren Kessler



## DECEMBER

**Article:**  
*Year End Tax Saving Tips* sent via mail

**Happy Holidays card for the family**



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

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