Top client event ideas for financial advisors

There are many ways to stay in front of current clients or to prospect for new clients in your business. Consider these top client seminar ideas to help financial advisors accumulate new assets and retain current clients. Just as physicians utilize "telemedicine" to see patients, advisors can "meet" with their clients using videoconferencing technology like WebEx, Zoom, and Skype. The following event ideas are suggested for virtual ( ) or in person ( ) sessions.

"How to" trainings — Whether teaching your clients how to use the Uber app, order GrubHub or Instacart, or training them how to use Zoom and FaceTime to connect with loved ones, hosting "how to" trainings can be effective in connecting with clients in person and virtually. These applications help make life easier and can act as a referral strategy as many attendees will share this information with others.

How to read your financial statement — Walk clients through their financial statements and explain what each item means. This exercise will help make clients feel more empowered and educated on their investments and decisions.

Travel the world with One Suitcase — Have a flight attendant speak about how to properly pack a suitcase. Have a discussion on international investing to tie in with the travel theme.

Tips for safe travels — Invite a Navy Seal as a guest speaker to share tips for traveling safely, including where to sit on an airplane and what to do when you first arrive to your hotel room.

Songwriting clinic — Feature a local singer to give a lesson in songwriting, creating a fun event for clients to be entertained and learn something new.

Washington to Wall Street update — Discuss changes to the tax landscape, the state of Washington, D.C., and the state of the markets.

iPad demo — Help clients understand iPad basics and which apps to consider for news, notes, social networking, entertainment, education, and more. Consider contacting Apple to see if it can facilitate virtual training.

Spring cleaning for your home and your finances — Bring in a local KonMari cleaning consultant to teach cleaning tips and tricks. The KonMari website allows you to search for consultants by location. After the consultant talks about personal organization, the advisor discusses the importance of financial organization and asset aggregation.

Career-transition clinic — Host an event to address how clients need advice as they transition in their career. Whether they are retiring, moving from a full-time to part-time schedule to care for children or elderly parents, or starting their own business, clients need advice.

Wine down to the weekend — Invite five of your best clients and their spouses to a wine-tasting event with a sommelier. Purchase the wines in advance and include tasting notes and value-add literature in a kit for clients. This also works great as *Wine, Women and Wealth*, creating a "wine night" with conversations about best practiced wealth strategies for women.

Going green — Invite an employee from Whole Foods to speak to the group (Whole Foods Go Green seminar) about the easy, everyday things we can do to save the environment. Close the meeting by presenting 10 simple things to know about investing for retirement.

Are you ready for college? — Have a college representative or perhaps a local high school guidance counselor speak to a group of parents about how their child can prepare for the college application process. You can then speak about funding the child's college education with a 529.

Be a healthier you: Physically and financially — Have a local nutritionist, personal trainer, or life coach speak about healthy habits and living in balance. Discuss healthy habits to help in reaching financial goals.

Identity-theft clinic — Check with your local police department or FBI office and have an expert give a session on how to avoid identity theft.

Cybersecurity training — Join forces with LifeLock, including speakers from The National Organization for Victim Assistance (NOVA). Offer free information to educate the audience on the many ways their information can be used fraudulently and how to take protective measures to minimize risk.

Social Security/Medicare update — Partner with the Social Security Administration on a client event. The SSA has speakers in local communities that will provide an update on the state of Social Security.

Panel discussion — Partner with local Centers of Influence (COIs) on various subject matter areas such as life, wealth, and self-defense. Host a virtual panel discussion where each selected speaker shares 5 minutes on a topic. This quick hit around the horn format can be great as a women's event or with your top clients.

Final days symposium — Bring in a mortuary spokesperson, estate attorneys, and long-term care specialists to discuss planning for those final days.

Cooking class — Host a cooking class from your own home with 5 clients and 5 prospects. Bring in a local chef to cook and instruct the group. Hosting this in your own home helps connect on a more personal level with clients.

Golf clinic — Invite a client and two friends to meet with a golf pro for private instruction followed by a round of golf. Some cities offer a downtown location for video swing analysis and a private lesson for a small group. This could be done after work and, if it is an indoor venue, is not weather sensitive. This offers you an opportunity to talk to clients about retirement planning so they can continue to enjoy golf in their golden years.

Defend yourself (and your portfolio) — Invite clients and prospects (works well with Mom's Morning Out groups, PTA, etc.) to participate in a 30-minute self-defense class with an instructor. The group then goes to lunch to hear how to defend their portfolio from Uncle Sam (tax strategies), difficult markets, inflation, etc.

Paper-shredding event — Provide a quick update to clients and prospects about how long to keep financial documents, discuss the importance of shredding to protect identity, and then shred away! Hire a professional shredding service to bring a truck to your location.

Back-to-school open house — Put together a robust "syllabus" of classes that clients and their family members can attend. Classes can range from financial topics like asset protection to lifestyle and fun events like "Introduction to Xbox" or a classic car show in the office parking lot.

Pumpkin patch — Bring the pumpkin patch to your office parking lot. Invite clients to come pick out a pumpkin and have a pumpkin-carving contest.

Food-truck event — Host a food truck event in your parking lot and invite your clients and their friends to attend for a unique dining opportunity. Many cities today have food trucks that include different types of food.

Valentine's Day lunch — Invite widowed and divorced clients to a luncheon on Valentine's Day. Have a Barber Shop Quartet serenade the clients, present a red rose to each client, or host a poetry reading at a local coffeehouse.

Luxury-car cocktail party — Invite clients and prospects to a cocktail party to see the latest in luxury vehicles. Reach out to a local luxury car dealer and tell them that you would like a fleet manager to come out with a couple of the latest and greatest models.

Happy-hour headshots — Invite working professionals and a photographer to a local restaurant for appetizers, drinks, networking, and the opportunity to get an updated professional headshot.

Flower-arranging event — Invite clients and their guest and instruct them to bring their favorite vases. The florist makes an arrangement for each vase, demonstrating the basics of flower arranging. Each client and prospect can take their arrangements home. This is usually pretty inexpensive as the florist wants to prospect for clients too. They will often do this just for the cost of the flowers.

Gift-wrapping class — During the holidays, contact a local department store manager and ask if they can send a gift wrapper to teach clients. Have clients bring a gift to donate to a charity of your choice.

Fashion update — Have a personal shopper update the audience on what's in and what's out. Partner with a local department store and include a fashion show of the season's latest style trends.

Jewelry or watch show — Partner with a local high-end jeweler and co-host an event for clients. Serve a bit of bubbly and appetizers.

Next steps

- ✓ Consult your home office to discuss client seminar requirements and guidelines.
- ✓ Utilize the Client Seminar Planning Worksheet to organize your event.
- ✓ Partner with Putnam for further resources.

We support themes that the advisor community is interested in

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Interactive tools
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