

Client Transition Welcome Gift Ideas

Send the Welcome Gift three weeks after the client transition, which should be close to the time of their full assets being transferred over. It also means they will have received the following items ahead of it:

1. Week 1 - Welcome Card
2. Week 2- Welcome Letter & Introduction Kit

The item you choose for this can be the same item you use as your “Welcome” gift for all future clients. Here are some welcome gift samples which are readily accessible, come in a variety of price ranges, are fairly universal in appeal, and are therefore easy to implement immediately.

- **Personalized Stationery Set with Quality Paper Holder (metal or wood)** [This can dovetail with Annual Anchor by sending a new set of personalized stationery each year]
- **Signal Vault** protective cards for carrying in wallets to protect your clients from digital hijacking of their personal information
- **Leather Travel Organizer** for keeping your clients organized even while they are away on vacation. It has a place for passports, currency, itinerary, etc.
- **Gift Basket with decadent** chocolates, wine/cheese/crackers or other gourmet consumables
- **Specialty Wine** shipped in Unique Wooden Box
- **High Quality Blanket**
- **Premium, Wind-Tested Umbrella**
- **Reusable Shopping Tote** (with a meaningful proverb)
- **Beautifully Crafted Local Artisan piece** (this could be a variety of items such as wooden bowls, pottery, art, etc.)
- **A Book** that is Impactful & Meaningful to Your Clients
- **Fireproof/Waterproof Document Protector Case**
- **Leather Portfolio** with Note Pad & Pen
- **Photo Art Calendar (it must be stunning)** [This can become an Annual Anchor]
- **Portable Phone Charger** or other useful electronic items
- **Unique Ceramic Coffee Mug Set** - little works of art
- **Stainless Steel Travel Mug (think YETI)**
- **High Quality Plant and/or Gardening Tools for Home/Yard**

