

# Outlining the Client Referral Event

## The 20 Essential Do's and Don'ts of Client Referral Event

Goal: Invite as many clients as possible and explain the new way you are doing business, why you need a structure to handle referrals, how the planning you have already done coordinates perfectly in their own retirement plan and how you plan to show them with the Retire Now Software. The new annual review process your firm is doing and the reason behind it. The new seminar Retire Now and why you think everyone needs to attend.

- Must have at least 50 to 100 clients (the more the better) before you do this, the more you have the better. Do not try this if you have less than 20 clients.
- Make sure you have a procedure guide for all parts of the event
- Where to host
- Invitations
- What you will say ( 5 minute Script)
- Handouts
- Follow-up
- Make an announcement that as part of your new business structure you will be conducting annual reviews with clients.
- Talk about the retire Now Software and Seminar that you will be hosting for clients and referrals alike.
- Tell them you will do a review showing how the planning you have already done for them coordinates with their retirement picture. ( Social security/pensions/IRA's)
- Only invite clients to this event. Do not invite prospects.
- Tell your clients how much you value their business and how you appreciate referrals, and you thought it would be wise to follow some structure in handling referrals.
- Describe in detail to your clients who is a qualified referral. Their age, assets size, their disposition. Also describe briefly who is NOT a qualified referral.
  
- Tell them the necessary steps to take if they refer someone to you.
  
- One Superb Referral
- The YOU Circle
- The Referral Guide



- The Referral Postcards
- The \$50 Gift Certificate
  
- Describe and show, your Referral Guide and how you would like them to hand it out.
  
- Try and get them to make personal introductions
- Make sure you follow-up with each referral and with every client that referred whether it was successful or not.
- Do not forget to thank your clients for trying to refer you
- Do not make a full blown presentation at this event
- Keep it light and bounce around and touch each and every client or make sure your staff does
- A breakfast time meeting on Saturday or Sunday is perfect
- Breakfast is cheaper than dinner or lunch
- Make sure you pay only for people that show, count on 20% of those that are confirmed not to show up
- If 80 say they are coming, tell the venue that 64 will attend
- Make sure you are not planning around a another big event happening nearby
- Make sure you have an appointment calendar with you to book appointments for people to come in
- Explain the new way you are doing business with an emphasis on retirement income planning.