

Wow Program

Thank you note after first appointment

Letter of Engagement

Thank you note after writing first business

Include a fridge magnet / pen / notepad / other 'doodad'

Thank you note after any additional business

Include a small gift certificate (coffee shop / restaurant)

Thank you note for referrals

Update on status of contact

Client package

Binder	Contact Information
Plan	Annual Review

Follow-Up

Contact clients monthly (at least bi-monthly) to find out what their needs are
Newsletters, nice touches, phone call

Referral Network

Loan Officers	Maid Service	Web Designer	Mortgage Broker
Accountants	Home Contractors	Realtors	Lawyers
Printers	Restaurants	Mechanics	Landscapers
Hair Dressers	Doctors	Massage Therapists	Teachers
Pastors	Friends	Family	Etc.

Birthday Cards / Anniversary Cards

Mailed one week before

Holiday Cards

Personalize with your company style
Try different holidays to get their attention (Halloween, St. Patrick's, Canada Day)

Anniversary Warning Notes

Sent to husband two weeks before with a coupon for restaurant / flowers / chocolates

Graduation Cards

Congratulating child and parents sent one week after

Hobby Info

Golf	Fishing	Racing	Cars	Arts & Crafts
Pets	Travel	Horses	Movies	Wine

Top Ten Club

Top Five Referrers	Top Five Clients
Gifts?	Party?

