

Client Appreciation Event Opening & Closing Scripts

Note: When holding client appreciation events don't miss the opportunity to share what makes your practice unique. When possible, open and close the event.

Opening

Introduce self:

Hello! I'm **[Insert Name], [Insert Title]** of **[Insert Company Name]**. Our team is also here this {afternoon/evening}, allow me to introduce you to **[Insert Name], [Insert Title]** (repeat for each team member present.)

Thank attendees for coming:

I want to thank everyone for coming.

Reason for events:

We hold these events to **[show appreciation/provide education]** for our clients, but also to offer a non-threatening environment in which to introduce friends, family, and co-workers to the practice.

Thank sponsor for support (if applicable):

The quality of these events are in a great part due to the support we receive from **[Insert Sponsor Name in Attendance and Sponsor Company Name]**. Please join me in thanking **[Insert Sponsor Company Name]** (clap).

Share mission statement:

The mission statement at **[Insert Company Name]** is **[Insert Mission Statement (e.g., Carson Wealth's: To inspire our clients to achieve True Wealth through education, communication, and service which exceeds their expectations.)]**.

Share value proposition:

Our mission statement is more than just words; it's the action we take. Let me define for you what a few of the keywords in our mission statement mean to me. **[Insert Your Value Proposition** (e.g., Carson Wealth's:

- » Our goal is to inspire you, our client, to live your life by design, not by default. Money is a tool to get the most out of your life.
- » Once you are inspired to share what you want out of life, next, we help you make informed decisions that are logical for you. Our skilled Certified Financial Planner, CPA, Attorney, and Insurance Specialist bring our resources together to develop a plan so you can accomplish your dreams.
- » Making informed decisions can only be accomplished by providing you with some education. You don't need to understand everything we are doing, but you do need a 10,000-foot view of what we are doing, why we are doing it, and how it applies to you.
- » Our communication doesn't stop at education. Many firms claim to communicate frequently with clients, but we take it a step further and we over-communicate so you know we know you as a person and not just an account. You will never be disappointed in the level of communication you receive from Carson Wealth Management Group.
- » We deliver a level of service which will exceed your expectations. In our country, expectation of service has never been lower. So, we are going in a different direction. We provide a Four Seasons experience with FedEx efficiency.
- » How can we do all this? We are independent and sit on the same side of the table as you. We have a seamless proactive service process which simply means we anticipate your needs before you even know there is a need. It means being bifocal which means paying attention to what is happening today and anticipating changes on the horizon. Additionally, the entire team does their piece to add value to the process which means it's not about working with Ron Carson, but about having a systemized approach so you get to: Experience the Carson Wealth Way.])

Introduce professional (e.g., chef, sommelier, etc.) (if applicable)

Let's get started and enjoy our time together. It is my pleasure to introduce **[Insert speaker or professional leading the event]**.

Closing

Thank speaker for presentation (if applicable):

Thank you **[Insert Speaker's or Presenter's Name]**. **[Share something you learned or are thankful for from the event.]** **[Open up for questions if applicable.]**

Mention next one – two events:

I hope to see you all again at our next event(s): **[Insert Event Information]**. If you have a friend, family member, or colleague you would like to introduce to **[Insert Company Name]** at one of these events, please let us know so we can invite them on your behalf.

More information:

Thank you again for coming and if you would like additional information about **[Insert Company Name]**, please take an Informational Packet on your way out. I look forward to seeing you all again soon.



CARSON
COACHING

Carson Group
13321 California Street
#100
Omaha, Nebraska 68154

carsongroup.com
800.514.9116
coaching@carsongroup.com