

## Welcome Gift Samples

Here is a list of items you may wish to review to help you identify your New Client Welcome Gift. They are readily accessible, come in a variety of price ranges and tend to be universal in appeal. Most are 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.
- **Coin Collection Album with Silver Dollar**<sup>1</sup> [This can dovetail with Annual Anchor by sending a new coin each year]
- **Gift Basket with decadent chocolates, wine/cheese/crackers or other gourmet consumables**
- **Specialty Wine shipped in Unique Wooden Box**
- **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 dovetail with Annual Anchor by sending a new calendar each year]
- **Letter Opener and/or Writing Ensemble**
- **Unique Ceramic Coffee Mug Set**
- **Stainless Steel Travel Mug Set**
- **Reusable Shopping Tote (with a meaningful proverb)**
- **High Quality Plant for Home/Yard**



<sup>1</sup> US Federal Reserve or Royal Canadian Mint. Some Advisors also use this as their annual anchor and add to the client's Silver Dollar collection each year on the account anniversary date or some other pre-determined time of year.