

THE COMPLETE *Client Party* CHECKLIST

2 Months

- Set your budget
- Set a date
- Reserve services: venue, caterer, photographer, DJ or live musicians
- Send Save the Date cards
- Choose a theme
- Create your guest list, including top clients as well as the vendors you work with the most, such as lenders, attorneys, home inspectors, etc.

1 Month

- Call to invite your guests
- Mail or email your invitations
- Purchase party favors and raffle items

2 Weeks

- Check in with the invited guests who haven't yet responded
- Call to confirm attendance

1 Week

- Send out email reminders
- Touch base with the photographer
- Create a music list
- Confirm the menu with the caterer
- Purchase decorations
- Assemble favors and raffle items

1-2 Days

- Stock up on drinks, snacks and food that's not being catered

Day of the Party

- Get to the venue early to set up
- Meet the vendors and get them situated
- Greet each guest as they arrive
- Thank your guests for coming to the party, as well as for their business and referrals

Client parties are fun and festive ways to connect with your clients. With a little bit of preparation, you can plan a memorable event that's sure to get your clients talking. Planning your next get together is a breeze with this handy checklist.

Event Ideas

The Weekend Starts Now!



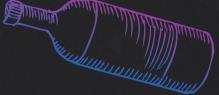
With kids back in school and people adjusting to new routines, Friday can't come fast enough. Choose a Friday evening in the first month back to school and host a pizza party. Gather all of your clients at a local pizza joint and have a variety of pies and salads, buffet style. You'll be the hero because no one has to plan dinner!

An Apple a Day!



September is a great month to kick off fall activities. What is more autumn than apple picking? Look into local orchards and host a picking party! Most places charge by the bag/bushel so it's an easy party to budget for based on the number of people you invite. No orchards around you? Check into getting fresh squeezed cider and host a "pick up party" that allows your clients to come by and grab a jug. Fill up their cup and their hearts.

Wine a Little, You'll Feel Better!



Invite your clients to bring a bottle of their favorite wine (choose a specific varietal and max price) but have them conceal the identity of it. Let everyone sample the wines and vote on which is their favorite. You can create comment cards to make it a little fancier and easier to determine the winner. The best wine wins a prize! This will also give you insight into what your clients favorite wine is for future unexpected extra deliveries.

After the Party

- Send a personal note to all attendees
- Update your database
- Send a personal note to your guests who didn't attend the party