



**Client parties are a fun and festive way 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.**

## 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

## After the Party

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



### Not Your Cookie Cutter Realtor

Host a cookie decorating party. Have several dozen pre-baked sweet treats in a variety of shapes that celebrate the holidays in the month of December. Supply all the fixings to make the cookies festive: red, green, silver and blue sprinkles, gel icing as well as frosting candy bits. Don't forget to grab takeaway bags so your clients can take some home (as if there will be any left)!



### Dashing Through the Snow or Streets

Hire a horse drawn sleigh or carriage depending on where you live to take your best clients on a festive and cozy ride on a crisp December night. Be sure to pack some blankets aboard so they can snuggle in and dream sugar plums dancing in their heads. Set up a hot cocoa station for them to enjoy while they wait or for after their ride.



### Giving Is Better Than Receiving

Partner with a local organization that helps families in need. Adopt a family or several and reach out to your database to participate in the gift giving. Share a Google doc with all the requests and have your clients sign up for specific items. This will make it easier to be sure no duplicate gifts are given and no one ends up empty handed on during the holidays.