

The Complete Client Party Checklist

Welcome the start of autumn with a client party to show how much you appreciate your A+ clients and their referrals. These unique and fun party ideas will be sure to keep you top of mind all year long!

1 Month

- Set your budget.
- Set a date and time.
- 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.
- Reserve the location or book any services needed.
- Call to invite your guests.
- Mail or email your invitations.

2 Weeks

- Check in with the invited guests who haven't yet responded.
- Call to confirm attendance.
- Purchase party favors and raffle items.

1 Week

- Send out email reminders.
- Create a music list.
- Confirm vendor details.
- Purchase decorations and supplies.
- Assemble favors and raffle items.

1-2 Days

- Stock up on drinks, snacks and food that are not being catered.

Day of the Party

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

Fun & Easy Event Ideas



Backyard Movie Night

Invite your clients over to watch a classic movie that you project onto a large screen or blank wall. Offer snacks such as popcorn, candy, pizza and soft drinks. Purchase some inexpensive blankets that clients can use during the movie.



Tailgate Party

Celebrate the start of football season with a Tailgate Party! Ask your guests to get into the spirit by donning their favorite team colors or apparel. Grill onsite or have the party catered. Get everyone moving by setting up a flag football game.