Brian Puckett Retirement Advisors is featured in this respected financial services industry publication. Here is the portion of the article that focuses on their exemplary client communications program.

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By: Marie Swift / June 1, 2004

Relationship Building Strategies – Part One

Multiply Referrals and Improve Client Retention through an Enhanced Communications Program

As a client-centered financial advisor, you should find lots of reasons to contact your clients (either one at a time or as a group) throughout the year. For instance, leverage your knowledge of the industry and current events to create a Special Report or Client Letter should also have a face-to-face meeting with you 2-4 times a year, including at least one social outing each year. A round of golf or a dinner out with spouses or friends can pay handsome dividends and be fun, too.

In addition, you may wish to host a client dinner (or other special event) once a year for your best clients, their friends, and other top prospects. Here's an example: Brian Puckett, JD, CPA/PFS, a fee-based advisor and principal of Brian Puckett Retirement Advisors in Oklahoma City, hosts an annual event for his clients. Each July he invites them to one of the city's most unique or classy venues. This year the event will be held at a botanical garden known for its outdoor sculpture exhibit. Each client is invited to bring a guest, and a select number of other influential people in the community receive an invitation.

This gives Brian a perfect opportunity to "up" the number and frequency of contacts with his clients and prospects. He'll mention the event in his newsletters, client letters and email communications, work it into the monthly columns he writes for local publications, send out a special invitation, place a follow up call to gather RSVPs, and send a recap-and-thank-you letter after the event. The event itself provides the flurry of well-timed, quality contacts.

At the event, he will be providing a one-hour commentary on how the firm works with clients, summarizing the results of the annual client survey (which were impressive), and talking about the markets and current investment climate – all in a beautiful setting with a receptive and enthusiastic audience. This presents another opportunity: He's hired a film crew to record the event, which will be put onto DVDs and mailed out to clients, prospective clients and Centers of Influence around town. The footage from the event will be supplemented with a studio-recorded introduction from Brian and an on-site tour of his office, where his team will speak briefly about who they are and how they serve the firm's clients.

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