

# Casino Night with the Clients!

## Make Client Experience Fun...

It's Friday night, music is in the air, drinks are pouring, and everyone is having a great time. "I'M ALL IN," someone yells from across the room. You look at your hand, turn on your poker face, and get your head in the game. Where are we? Your very own client event!

Every year, the Integrity Wealth Planning (IWP) team hosts their Casino Night event, and it's always a hit! This client event entails a beautiful venue, delicious food, beverages, and a unique experience. Clients enjoy a night of gaming in a professional Vegas-style setting that includes roulette, blackjack, and other casino games.

"We tell our clients that this is the only venue to gamble and play with money," says Adiane Ginyard, IWP Office Manager, "Serious money is in the office."



*Susan (seen in the middle, wearing black) and her clients enjoy a night at the Casino!*

At the end of the evening, chips are exchanged for raffle tickets. Tickets are pulled randomly from a drum to win a variety of prizes. The event is conscious of state gaming laws, and there is no actual money exchanged.



*Clients enjoying Casino Night with IWP!*

**"Casino Night is an event I won't miss. It's gambling, eating, drinking, talking to wonderful people I know or get to meet- but most of all it's Susan Hurschman Night. She surrounds herself with a great group of office staff and of fellow clients. It's a good evening for everyone."**

– Cliff and Susan Wagner, IWP Clients

Principal Advisor, Susan Hurschman, and her team have hosted Casino Night in Plantation, Florida for four years. It is exclusive to clients and their guests, Susan personally thanks everyone for attending this fun-filled event. Everything is planned at least four months in advance and it is prepared in-house, with no third parties involved. A checklist, like the one seen below, helps keep things organized:

- Date is secured with the venue
- Consult the casino company to secure the necessary equipment
- Card companies are priced out to order "Save the Date" and invitation cards (& track RSVPs)
- Catering decisions are made
- Lay out the floorplan

To make things simple, the previous year's guest list is revised to meet the current event needs.

“We like our clients to be a part of a family,” says Hurschman. “We want the client experience to reflect that we are not only interested in their portfolios and goals, but we also value the relationship holistically.”

### What is Client experience and why is it important?



*Integrity Wealth Planning Clients enjoy a game of craps*

The client experience is looking at the overall journey or experience of the client and seeking ways to improve each touch point to stand out from the competition. It can involve a proactive approach to seek feedback and further the relationship.

**“In a world where products and services are plentiful and companies are fighting for attention and positions in the marketplace, a good client experience strategy is a competitive advantage.”**

**- Forbes**

With client experience being one of our Key Focus Areas, The J.W. Cole Advisor Solutions team is dedicated to helping our Advisors gain that advantage! Resources and consulting services are available with the click of a button or a simple phone call. Visit the Advisor Solutions page on JWConnect for more information.

Thinking of your next client event idea? Susan suggests keeping three important things in mind:

1. Provide plenty of **notice**
2. Provide a unique **atmosphere**
3. Provide a **first-class** environment

A short list but, effective nonetheless.

### **IWP Client Casino Night Feedback:**

“What a wonderful way to spend an evening. Our financial advisor, Susan Hurschman, brings her clients together for a fun-filled evening of drinks, dinner, casino night, and just good networking. Even though none of us want to talk about our portfolios, we are all in agreement that Susan has our best interest in mind, and tailors each of her client’s financial picture to their goals. We all have a great time seeing each other year after year.”

– Nancy and Ron Feller, IWP Clients

“As a long time client of Susan Hurschman, it gives me great pleasure to acknowledge and praise the great time she afforded her “clients”. I’m not sure she would approve of my use of the word “clients”, as it was apparent that the Casino Night was populated with her friends (aka: clients). The playful gambling was highlighted by jovial staff members who helped make the evening far more than a “Casino Night” by their warm and engaging manner. Furthermore, Susan, her staff, and family served as the catalyst inducing the

guests to enjoy each other's company and have a great time. As always the evening was topped off with great food and an entertaining raffle that proved to be very rewarding for the winners!

- Robert Greene, IWP Client

"My husband and I have been clients of Susan Hirschman over 10 years. In addition to her wonderful investment advice, we always enjoy the Casino Night event. It gives us an opportunity to socialize with her and her staff in addition to the other guests. It's fun to play the games (blackjack is my favorite) and collect as many chips as possible to exchange for the raffle tickets. Of the three great raffle prizes this year, we won the Bose Soundsport! We look forward to the event every year in addition to other events that she hosts."

- Twila Day and Michael Dillon, IWP Clients

**Sources:**

Integrity Wealth Planning: <http://www.integritywealthplanning.com/>

Client Event Ideas: <https://www.theadvisorcoach.com/11-awesome-client-appreciation-event-ideas-for-financial-advisors.html>

Client Experience: <https://www.forbes.com/sites/forbescommunicationscouncil/2018/01/29/client-experience-as-a-competitive-advantage/#3cc63a9156b3>

Advisor Solutions Page on JWConnect: <https://jw-cole.info/advisor/advisorsolutions/>