

# Financial Services



## Case History

Type of Organization: Financial Planning Company  
Goal of Promotion: Referral Gifts

Product Features: ESCT124

Case History: The firm chose Chocolate Almonds packaged in an elegant gift box imprinted with their logo. After the meeting with their clients, they would ask them to fill out a brief questionnaire regarding the firm's level of service and their satisfaction. At the bottom of the form, it stated: "We would like to provide the same high level of service to your friends and colleagues. Please let us know of anyone who could profit from our service and we will send you a sweet reward for each referral!" After only six months, the program resulted in two dozen referrals and seven new clients! Sweet and successful!



Type of Organization: Mortgage Lender  
Goal of Promotion: Closing Gifts

Product Features: L635

Case History: A national mortgage lender chose our Wisconsin Variety Package as a way to say "Thank You" to new home owners at the time of their closing. They send over a monthly order, and we send the delectable cheese and sausage gift directly to the recipients. With the company name fire-branded on the cutting board, it's a hit with the homeowners and a lasting reminder of the smooth financial transaction.



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