

A FINANCIAL ADVISOR'S GUIDE TO **VIRTUAL MEETINGS**



FUN TECH FOR WOWING CLIENTS

The best thing about operating in a virtual world is the opportunity we have to wow clients. There are numerous websites and apps where you can order and send thoughtful and fun gifts, making up for some of the human touch we lose by having virtual meetings.

Crystal Washington's suggestions for how to wow a client

- General gifts: **Giftagram**
- Creative and functional gifts: **The Grommet**
- Unique, unusual and quirky gifts: **Uncommon Goods**
- Alcohol: **Drizly**
- Photo books: **Photobookapp**
- Personalized celebrity messages: **Cameo**
- Find creative freelancers: **fiverr**
- Customized cards: **SendOutCards** and **Touchnote**



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Visit columbiathreadneedleus.com

Advisors must log in or register to access all resources.

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