Family to family

A client appreciation gift that replaced a 15-year fruit and cheese tradition and reminded client families why the relationship matters.



CLIENT	A large, family-owned wealth management firm based in Raleigh, North Carolina
RECIPIENTS	High-net-worth and ultra-high-net-worth clients, most of them families
GOAL	Thank clients for the relationship after a tumultuous market year, and offer them some comfort
CONCEPT	A gift from one family to another, inviting recipients to rest after a stressful year

01 The challenge

For 15 years, clients had received the same fruit and cheese basket. The tradition had become routine. After a difficult year in the markets, the firm wanted a gift that felt personal, offered real comfort and reflected its Raleigh roots.

02 The strategy

The box was built around one idea. After a long, stressful year, take some time to rest together as a family.

Made for rest

A herringbone throw, a candle, a hand-carved olive wood snack bowl and a few treats invite recipients to slow down and spend time together at home.

A piece of Raleigh

The City of Oaks candle, made by hand in Raleigh by Porch Fly Supply Co., reflects the firm's hometown.

Reassurance ahead

The messaging acknowledged a hard year and pointed to a positive outlook for the year to come.

One family to another

The notecard spoke from the firm's family to the recipient's family, true to a family-owned business.

03 The result

$1MM in additional investment from a single client, sparked by one gift.

Two days after the gifts arrived, one recipient called the firm and asked someone to pick up a check for an additional investment. The amount? $1 million. They explained that they'd actually planned to invest the money with another firm, as their relationship had begun to feel routine. But the thoughtfulness behind the gift made them feel genuinely valued again, and ultimately changed where they chose to invest that $1 million.

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