



# FINANCIAL ADVISOR INVESTS IN HOLIDAY GIFTS THAT GIVE BACK

[Riverbend Wealth Management](#) is an independent, fee-based financial advisor for businesses and retirees. Their mission is to help clients live their best life. One way they do that is by giving back.

## CHALLENGE: GIVING A GIFT TO CLIENTS WHO HAVE EVERYTHING

Riverbend Wealth Management was searching for a more meaningful holiday gift for clients. In the past they've sent them either pies or turkeys. They were practical gifts, but not very personal. Since most of their clients have at least \$500K in investable assets they don't really need anything practical. Riverbend Wealth Management wanted to find a gift that captured the holiday spirit and reflected their mission to help clients live a life of peace, joy, and happiness.

## SOLUTION: CELEBRITY-ENDORSED CHARITY GIFT CARDS

They celebrated the season with their clients by giving back to their favorite charitable organizations. After a Google search for unique holiday gifts for clients, Riverbend was intrigued by the idea of charity gift cards. They researched a few different organizations. When they saw that TisBest Philanthropy was endorsed by The Ellen DeGeneres Show they knew they found a great fit. Riverbend sent clients an email letting them know their gift would be arriving in the mail. Next, each client received a holiday greeting card. Enclosed was a \$50.00 TisBest Charity Gift Card with instructions on how to pay it forward to the charity of their choice.

## CASE STUDY

### COMPANY

Riverbend Wealth  
Management

### INDUSTRY

Wealth Management

### LOCATION

Myrtle Beach, SC

### SIZE

3 employees



## WHY TISBEST?

- Meaningful holiday gift for clients
- Endorsed by The Ellen DeGeneres Show
- Seamless charitable giving experience
- Donation is 100% tax deductible and FINRA compliant

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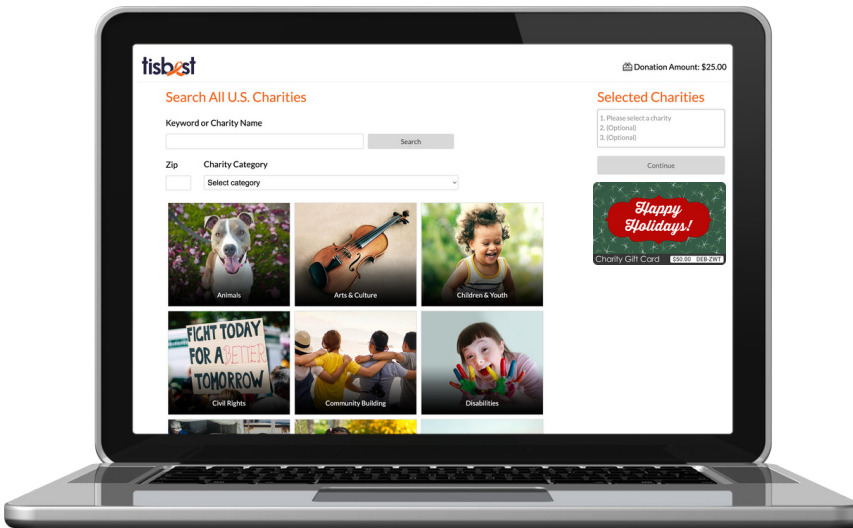
CLIENT GIFTS

# \$1K

FOR HEALTH & WELLNESS

# \$3.7K

DONATED



“TisBest is a seamless organization. What a pleasure it’s been working with you. Everything ran super smoothly and we will absolutely do this again next year. The feedback from our clients is truly overwhelming in such a positive way.”

– Roxanne Mut,  
Operations Manager, Riverbend  
Wealth Management

## RESULT: SHARING THE WEALTH WITH THOSE WHO NEED IT MOST

In addition to giving back to many great causes, Riverbend’s donation was 100% tax deductible and FINRA compliant. It was a win-win for Riverbend and their clients. The best part of the experience was the positive feedback they received from the recipients. Clients were thrilled to see so many of the charities that they already support on the TisBest website. They also enjoyed learning about other charities they hadn’t heard about before.

The whole experience from placing the order to client follow up was seamless. TisBest’s order details page made it easy to track when the gift cards were redeemed and which charities their clients supported. A couple of clients shared that they lost their gift cards over the hectic holiday season. Riverbend simply looked up the clients’ gift card code in the donation report and emailed them with the link to redeem it. As each card was redeemed Riverbend noted each client’s selected charity in their file. Now they use that information as a great conversation piece for clients’ annual reviews.

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