

READY FOR ADVISOR REVIEW

Maple Grove · Holiday gifting plan

Clients included

30

Clients matched

30

Gift subtotal

\$1,387.00

Prepared by Alex Morgan, Client Service | Advisor: Riley Parker



But First, Coffee Gift

\$190.00

5 clients × \$38.00 each



A Simple Thank You Gift

\$550.00

10 clients × \$55.00 each



Giant Cookie Tray, 6 Cookies

\$250.00

10 clients × \$25.00 each



Happy House Gift Set

\$396.00

4 clients × \$99.00 each



Retirement Adventures

\$100.00

1 clients × \$100.00 each

Gifts before offer: \$1,486.00 Proposed featured-gift discount: \$99.00

Shipping, tax and card charges are not included. The proposed offer applies only to 25 or more featured gifts. Stock, delivery timing and the final quote need confirmation.

FOR ADVISOR REVIEW

Personal touches & advisor review

THE MESSAGE TO YOUR CLIENTS

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Riley Parker, Maple Grove Planning

Gift-only budget: \$1,500.00. Proposed gifts: \$1,387.00. Remaining before other costs: \$113.00

Preferred arrival: 2026-12-10. Delivery window is not confirmed.

A note for your advisor

The holiday assortment covers 25 clients. Five clients receive a gift tied to a recent retirement or new home. Please review the gift mix, the two personal notes, and the proposed gift-only budget before we request the final quote.

Preparation complete. Approval still needed.

☐ Proceed to the next review step

☐ Changes requested

Advisor: _____ Date: _____

Comments: _____

This document records a review request only. It does not grant firm approval, reserve inventory or authorize payment or sending. Final pricing and delivery verification remain separate.

REVIEW APPENDIX · DELIVERY ADDRESSES OMITTED

Client-by-client assignments

Personal notes below replace the shared message. Excluded clients are labeled separately.

Avery Example

Retirement Adventures

Congratulations on your retirement, Avery. Wishing you wonderful adventures in this next chapter.

Jordan Example

Happy House Gift Set

Congratulations on your new home, Jordan. Wishing you many happy memories there.

Morgan Example

Happy House Gift Set

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Casey Example

Happy House Gift Set

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Taylor Example

Happy House Gift Set

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 06

But First, Coffee Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

REVIEW APPENDIX

Client assignments, continued

Fictional Client 07

But First, Coffee Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 08

But First, Coffee Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 09

But First, Coffee Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 10

Giant Cookie Tray, 6 Cookies

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 11

Giant Cookie Tray, 6 Cookies

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 12

Giant Cookie Tray, 6 Cookies

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 13

Giant Cookie Tray, 6 Cookies

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

REVIEW APPENDIX

Client assignments, continued

Fictional Client 14

Giant Cookie Tray, 6 Cookies

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 15

Giant Cookie Tray, 6 Cookies

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 16

Giant Cookie Tray, 6 Cookies

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 17

Giant Cookie Tray, 6 Cookies

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 18

Giant Cookie Tray, 6 Cookies

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 19

Giant Cookie Tray, 6 Cookies

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 20

A Simple Thank You Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

REVIEW APPENDIX

Client assignments, continued

Fictional Client 21

A Simple Thank You Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 22

A Simple Thank You Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 23

A Simple Thank You Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 24

A Simple Thank You Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 25

A Simple Thank You Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 26

A Simple Thank You Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 27

A Simple Thank You Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

REVIEW APPENDIX

Client assignments, continued

Fictional Client 28

A Simple Thank You Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 29

A Simple Thank You Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.

Fictional Client 30

But First, Coffee Gift

Thank you for being part of our year. Wishing you and your family a wonderful holiday season.
