Financial & Wealth Management Process Guide

Welcome to leparfum.ai Private Client Programs

Deliver recognition that matches the sophistication of your clientele. This confidential guide outlines how to implement personalized fragrance programs that deepen relationships with high-net-worth individuals and families.

Program Overview

Clients create bespoke fragrances reflecting their unique success stories, receiving ultra-luxury products that acknowledge their individuality beyond portfolios.

- Minimum Order: 10 fragrances
- Timeline: 4 weeks with white-glove service
- Privacy: Complete discretion assured

Program Applications

Client Appreciation
Annual recognition for your most valued relationships.

Milestone Celebrations
Portfolio achievements, liquidity events, transitions.

Family Office Programs
Multi-generational engagement and legacy building.

Advisory Events
Exclusive experiences for board members and advisors.

Implementation Process

Step 1: Confidential Consultation
We discuss:

- Client demographics and preferences
- Privacy and security requirements
- Gifting occasions and frequency
- Brand representation needs
- Success metrics

All conversations held in strict confidence.

Step 2: Program Structure
Upon agreement:

- 50% deposit initiates program
- White-label options configured
- Security protocols established
- Timeline confirmed

Step 3: Discreet Branding
Subtle luxury approach:

- Institutional mark placement
- Elegant, understated design
- Premium material selection
- Personalization options
- Ultra-luxury tier availability

Step 4: Client Selection
Secure data handling:

- Encrypted file transfer
- Reference codes if preferred
- Limited access protocols
- Data destruction after fulfillment

Information needed:

- Names or reference codes

- Delivery addresses (multiple if needed)
- Occasion or milestone
- Personal messages

Step 5: Program Activation
Upon balance payment:

- Secure links generated
- Distribution method confirmed
- Advisor talking points provided
- Support protocols activated

Step 6: Distribution Excellence
Choose your approach:

- Personal Presentation: During quarterly reviews
- Private Delivery: Direct to residences
- Event Distribution: At exclusive gatherings
- Milestone Timing: Triggered by achievements

Step 7: Client Experience
Your clients enjoy:

- Elegant digital journey
- 2–5 minute private creation
- Sophisticated question flow
- Immediate confirmation

Complete privacy maintained throughout.

Step 8: Artisan Production
Each fragrance represents:

- IFF master perfumer artistry
- 20% Extrait de Parfum richness
- Very high natural ingredients
- Hand-finished details
- Optional crystal flacons

Step 9: White-Glove Delivery
Fulfillment excellence:

- Discrete packaging
- Multiple address coordination
- International capabilities
- Signature service options

No pricing or promotional materials included.

Step 10: Relationship Deepening
Ongoing benefits:

- Reorder capability via private portal
- Anniversary reminders
- Family member additions
- Legacy program development

Service Excellence

Dedicated Private Banking Team
Your institution receives:

- Senior account management
- 24/7 priority support
- Quarterly business reviews
- Complete confidentiality

Advisor Resources

- Presentation materials
- Client conversation guides
- Gifting occasion calendar
- Training sessions

Security & Compliance

- SOC 2 certified processes
- Encrypted data handling
- Compliance documentation
- Audit trail maintenance

Program Enhancements

Ultra-Luxury Options

- Rare ingredient access
- Crystal flacon presentation
- Numbered editions
- Archival documentation

Family Programs

- Multi-generational experiences
- Legacy fragrance creation
- Succession planning integration
- Family office alignment

Global Capabilities

- International delivery
- Multi-currency processing
- Cultural customization
- Regional compliance

Client Occasions

Portfolio Milestones

- First million managed
- Significant appreciation
- Successful transitions
- Goal achievement

Life Celebrations

- Retirement planning complete
- Business exits
- Philanthropic milestones
- Family achievements

Annual Recognition

- Partnership anniversaries
- Holiday appreciation

- Birthday acknowledgments
- Custom occasions

Value Proposition

For Your Clients

- Truly personal recognition
- Unavailable elsewhere
- Heirloom quality
- Emotional significance

For Your Institution

- Differentiation tool
- Relationship deepening
- Referral generation
- Legacy building

Confidentiality Assurance

All client information handled with bank-level security. NDAs available upon request.

Volume Benefits

Programs of scale receive enhanced pricing and dedicated infrastructure.

Ready to Elevate Your Client Recognition?
Contact us for a confidential discussion about creating deeper connections with your most valued relationships.