

# You Think You Know Gift Giving? Think Again.

By Tina Powell

When John Ruhlin, the esteemed author of Giftology, heard about Cameron Herold's remarkable success—taking 1-800-GOT-JUNK from \$2 million to \$120 million in revenue and landing 5,000 media articles in just five years—he was intrigued.

But John didn't just want to meet Cameron. He wanted to leave him awestruck.

His first idea? Invite Cameron to a fancy steak dinner. Classic, but meh. How about a round of golf at a luxury resort? Too predictable. Besides, what if Cameron hated golf? Or worse, was bad at it?

This wasn't about mailing a fruit basket or slapping a logo on a coffee mug, either.

John's approach to gift-giving was in a league of its own.

## The Power of Thoughtful Gifting

After meticulously researching Cameron's taste, values, and style—right down to his Brooks Brothers preferences—John did the unthinkable.

He handpicked items from their new line of premium collection of jackets, belts, shirts, and accessories, curating \$7,000 worth of high-quality, custom goods. But the real magic wasn't in the price tag—it was in the presentation.

John then arranged for the Ritz-Carlton to display the entire collection in Cameron's room, laid out with flawless attention to detail.

The result? When Cameron walked in, he wasn't just impressed—he was completely floored.

From that moment on, until John's untimely passing this year, Cameron became one of his greatest advocates, referring countless clients to John and solidifying a relationship built on generosity and trust.

Why? John's extreme approach isn't about transactional gestures. It's about creating moments that leave a lasting impact. These principles form the heart of Giftology, John's framework for using gifting as a strategic act of service to:

- Strengthen relationships and accelerate referrals
- Enhance client and employee loyalty to boost retention
- Create unforgettable experiences that drive revenue growth

## The Foundation of Business Success

While this example is undeniably extravagant—and something financial advisors cannot replicate due to FINRA Rule 3220 (the "Gifts Rule"), which prohibits members and their associates from giving gifts exceeding \$100 per year to any individual in connection with the recipient's employer's business—John's approach in Giftology provides three valuable lessons for financial advisors on the art of building meaningful relationships.

1. **Relationships Are the Cornerstone of Success.** In today's fast-paced, transactional world, it's not what you say—it's how you show up that truly matters. Gifts are the ultimate love language of deep relationships.

2. **Thoughtfulness Over the Gift Itself.** “People don’t care about the gift itself,” John explains. “They care about the thoughtfulness and intention behind it.” Even the simplest of gifts show people you’re thinking of them, even when they’re not around.
3. **The Giftology Golden Rule.** Every gift must be given with no strings attached—no asks, no quid pro quo. The goal is pure appreciation: an act of selfless generosity that deepens connections and demonstrates care.

## The Takeaway

Gift giving isn’t about the gift itself—it’s about how you make people feel. When you go beyond the ordinary and infuse generosity and thoughtfulness into every detail, you’re not just building relationships; you’re communicating the undeniable fact you care.

To help you get started, we at Intention.ly have curated our own I.ly Holiday List of ideas below \$100:

“Wonderful. The rare money book that realizes life is more than dollars and cents.”  
—MORGAN HOUSEL  
International bestselling author of *Same as Ever* and *The Psychology of Money*

# How to Retire

20 LESSONS FOR A  
HAPPY, SUCCESSFUL, AND  
WEALTHY RETIREMENT

**Christine Benz**

DIRECTOR OF PERSONAL FINANCE AND  
RETIREMENT PLANNING AT MORNINGSTAR



### 1. “How to Retire: 20 Lessons for a Happy, Successful, and Wealthy Retirement” by Christine Benz.

Just released in October 2024, this insightful book is a perfect gift for financial advisors to share with clients. Take it a step further by inscribing a personal message on the inside cover and adding handwritten Post-it notes to highlight sections that are particularly relevant to each client. This thoughtful gesture not only adds value but also strengthens the advisor-client relationship.

Cost: \$17.99

Amazon Link: [How to Retire](#)

### 2. Monogram Family Name Custom Made Metal Sign 24-inches.

This sleek and modern piece makes a striking impression, adding a personalized touch to any space. It’s a gift your clients will cherish, serving as a constant reminder of your thoughtful gesture every time they see it displayed on their wall.

Cost: \$69.00.

Etsy Link: [Custom Monogram Sign](#)



### 3. A Self-Watering Easyplant.

Easyplant is a thoughtful gift that combines elegance with convenience. Each plant comes in a self-watering pot featuring a hidden reservoir that requires refilling only once a month, simplifying plant care. Whether you choose a Money Tree or a Parlor Palm, Easyplant offers cost-effective, pet-friendly, and low-light options, each priced under \$100. These selections ensure your clients receive a beautiful, low-maintenance addition to their space, reflecting your thoughtful consideration.

Cost: Starting at \$39.00

Link: [Easyplant.com](#)

#### 4. Personalized Wood and Marble Round Cheese Board.

Elevate your holiday gifting with a personalized wood and marble round cheese board. This elegant piece combines cool marble and warm acacia wood, providing a stylish platform for your favorite cheeses. Each board is unique, thanks to the natural variations in the materials. Crafted by a socially responsible company committed to fair trade and equal opportunity, this gift not only delights but also supports ethical practices.

Cost: \$47 + \$15 to add personalization

Link: [Mark & Graham](#)



#### 5. Support Their Cause.

Making a donation to a 501(c)(3) nonprofit organization is a meaningful way to support causes your clients care about. To find and contribute to charities aligned with their interests, visit [America's Charities](#). Their platform allows you to search for nonprofits by cause—such as hunger, poverty, or education—and by location, including specific states.

Cost: One-Time Donations starting at \$25.00.

Link: [America's Charities](#).

When considering your next gift, take a moment to reflect on your clients and what would truly resonate with them. As John Ruhlin illustrates, thoughtful gifting is more than a gesture of kindness—it's an art form that can leave a lasting impression for years to come.