

Be Really, Really Strategic!

When you are thinking about the different types of professionals you'd like to include in your network of Strategic Partners, go beyond the typical ones – the CPA and Lawyer – to include those who truly provide an invaluable service to your clients based on their demographics or any niche you may serve. This is where you have another opportunity to showcase your value with clients.

For instance, if many of your high value clients are business owners, it's in your best interest to add professionals that provide a variety of business-related services to serve them. This may include commercial banking & lending services, business brokering, corporate insurance services, and group health and/or retirement plans. Some of these people may be internal or on your team and others may be external. The important thing is you are the one making these connections easy for them.

