

What You Can Expect from this Best Practice

PURPOSE

- To build trust in you, your approach and your financial planning advice
- To reconnect with your top clients in an impactful way
- To ensure clients feel great about working with you and feel appreciated by you

EXPECTED RESULTS

You will:

- Set the stage for an enhanced productive, professional relationship
- Achieve higher client engagement resulting in an increase in assets under management, new business and increased revenue from existing clients
- Achieve introductions from your existing clients, which will also increase assets under management and revenue generated.

Your clients will:

- Be on the receiving end of an exceptional client experience, which we all know is rare

ACCOUNTABILITY

You will:

- Feel confident in your renewed partnership with your top clients.

Your clients will:

- Be more receptive to your financial planning recommendations.
- Talk about your trustworthiness.
- Talk enthusiastically about what you do and how you do it.
- Be clear, precise and accurate when describing you and your approach to family, friends and associates.