



ANSWERING “HOW’S THE MARKET” AND OTHER COCKTAIL PARTY QUESTIONS

Objective

Turn casual questions into opportunities to communicate “Who you are”; “What you do” and “Why you are good”.

How?:

Examining casual questions by uncovering the real question, the message to convey, the message to avoid and providing examples of responses.

What Does the Seminar Contain?

Five Questions Asked in Social Situations:

- What do you do?
- How much do you charge?
- What size accounts do you handle?
- How’s business?
- How’s the market?

Two Statements Often Mentioned in Social Situations

- I already have a broker
- I’m thinking of using a financial planner

Followthrough:

- Points to review after the conversation to determine level of opportunity

Action Plan:

- Step-by-step action plan with measurable deliverables

Links to Articles Highlighting Strategies From Seminar:

Giving Out the Right Signals *FT Publications, Financial Adviser 7/19/07*

<http://www.ftadviser.com/2011/10/30/giving-out-the-right-signals-iun9pVIL5hKvftgSRa35K/article.html>