



BEYOND REFERRALS – HOW DO LARGE, ESTABLISHED PRODUCERS ADD NEW CLIENTS?

Objective

Identify strategies for established advisors to add additional HNW relationships to their clientele.

How?:

Reviews ten strategies, assuming larger producers can take longer time line, develop niche and invest money in their practice.

What Does the Seminar Contain?

What Makes a Strategy Effective?

- Why are some strategies better than others?

Ten Innovative Strategies to Reach HNW Prospects:

- Exclusivity strategy
- Client – Prospect dinners
- Retirement party for client
- Movie theater event
- Free service for other business
- Trade show cocktail reception
- Executive conference calls
- Overnight Mail – Welcome to City
- Where do you eat lunch?
- The Grand Gesture

Two Additional Ideas:

- Identity theft seminar
- Golf at luxury hotel

Action Plan:

- Step-by-step action plan with measurable deliverables

What Do Advisors Say?



- *“Well prepared, well presented. Good presentation.”*
- *“Getting excited about prospecting”*
- *“Helps generate more ideas”*
- *“Ideas I feel I could use”*

Links to Articles Highlighting Strategies From Seminar:

How to Mix With the Right Crowd *FT Publications, Financial Adviser 2/14/08*

<http://www.ftadviser.com/2011/10/29/ifa-industry/advisory-companies/how-to-mix-with-the-right-crowd-Eto42ggBMSEB6ZZpeqSd7I/article.html>