



TALKING WITH WEALTHY PEOPLE (AND GETTING THEM TO LIKE YOU)

Objective

Meet wealthy people in social situations, learn about interests, develop social relationships, learn about needs and develop business relationships when appropriate.

How?:

Learn to have conversations with people where a significant gap of age, wealth or social status exists through a sequence of meeting a person, making conversation, identifying areas of shared interest and building on those interests as a reason to see again and cultivate a social relationship.

What Does the Seminar Contain?

Three Ways to Meet People in Social Situations:

- Introductions
- Friends in common
- Compliment or observation

Meeting People:

- What makes a person interesting to HNW individuals
- How can others tell if you are sincere?
- Starting conversations – Safe subjects

Types of the “Right” Organizations:

- Pros and Cons – Why some are preferable to others
- Specific examples in the local market

Carrying On Conversations:

- Explaining “What you do”
- How to tactfully learn about their interests
- Questions that give you information
- Finding their “passion”
- Turnoffs

Concluding the Evening and “Seeing Them Again”:

- Points to establish before you part company
- How to contact them afterwards
- How to approach when seeing them at subsequent events
- Developing the relationship going forward

Action Plan:

- Two page step-by-step procedure to implement strategy.
- Includes measurable deliverables at each step

What Do Advisors Say?



- *“Fact that it’s my job to build relationship and cultivate it”*
- *“Great information on social conversations and handling relationship building”*
- *“Great conversation starters and follow-ups”*

Links to Articles Highlighting Strategies From Seminar:

Lend a Listening Ear *FT Publications, Financial Adviser 1/13/2011*

<http://www.ftadviser.com/2011/10/25/ifa-industry/advisory-companies/lend-a-listening-ear-S1ckRrWzROP6ZStjVYKcGj/article.html>

Winning the Wealthy *Professional Adviser (UK) 2/1/2010*

<http://www.ifaonline.co.uk/professional-adviser/feature/1591410/better-business-winning-wealthy>

Holiday Networking *Professional Adviser (UK) 12/17/2009*

<http://www.ifaonline.co.uk/professional-adviser/feature/1566215/better-business-holiday-networking>