



WHERE TO MEET AND SOCIALIZE WITH WEALTHY INDIVIDUALS

Objective

Meet wealthy people in a social environment that enables the financial advisor to see them regularly and tactfully develop social and where appropriate, business relationships.

How?:

Utilize a systematic process to select organizations that are a good personal fit while maximizing potential for success; doing realistic estimates of cost in time and money; identifying how you raise your visibility and where business comes from through your efforts.

What Does the Seminar Contain?

The Wealthy Know Each Other and Socialize Together:

- Examples of donors to high profile charitable organizations
- Duplication of names on lists

Choosing the Right Organizations:

- Four characteristics of the ideal organization
- How important is passion?
- What is acceptable in its place?

Types of the "Right" Organizations:

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

What Does it Cost?

- Involvement at the introductory and advanced levels
- How should the advisor approach charitable giving within the organization?

How Much Time Does It Take?

- Recommended activities at each event or meeting attended, Cumulative results

Introductions – Who You Need to Know?

- Important members of the professional staff
- Volunteers in influential positions

How Do You Get Business?

- Seven examples of opportunities for the FA
- What are the Obstacles?

How Do You Make An Impact?

- Raising your visibility in the organization
- Three roles matched to skills possessed by most FAs

WIIFM?

- "What's in it" for the advisor?
- "What's in it for the organization?" - How do they benefit?

Action Plan:

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

What Do Advisors Say?



- “Finding out what organizations to join and how in a ‘light way’ to build rapport...”
- “Unique prospecting ideas”
- “This was the best”
- “Events to get involved in – More info on how to do it”
- “How to get in a HNW circle”

Links to Articles Highlighting Strategies From Seminar:

It's a Stick-Up *FT Publications, Financial Adviser 8/4/11*

<http://www.ftadviser.com/2011/10/14/ifa-industry/advisory-companies/it-s-a-stick-up-osyQh8lY4q1Latto8G0LKO/article.html>

In the Fast Lane *FT Publications, Financial Adviser 2/3/11*

<http://www.ftadviser.com/2011/10/25/ifa-industry/advisory-companies/in-the-fast-lane-8Qtv9GYRJqyRDM7Pc0OIWO/article.html>

Offering Up Your Services *FT Publications, Financial Adviser 4/10/08*

<http://www.ftadviser.com/2011/10/29/ifa-industry/your-business/serving-the-people-cBORAVI2yjWDzmxh13PaVI/article.html>

Pulling Yourself Up By the Old School Tie *FT Publications, Financial Adviser 9/4/08*

<http://www.ftadviser.com/2011/10/29/ifa-industry/your-business/pulling-yourself-up-by-the-old-school-tie-elFcgz88V0RVKy5CDhRaIK/article.html>

Find Ways of Getting In With The ‘In’ Crowd *FT Publications, Fin'l Adviser 8/3/06*

<http://www.ftadviser.com/2011/10/29/finding-ways-of-getting-in-with-the-in-crowd-AZJnDepoTDeZqu9XHcdFjI/article.html>