



CLIENTS WANT THE OPPORTUNITY TO HELP YOU

Dear Fellow Advisors,

A consistent stream of positive endorsements from clients is what all financial advisors dream for their business - firms with client advocates who help build the client base.

Most advisors realize that they need to build a foundation first to be referable. Many advisors, myself included, meticulously build client service systems, conduct ourselves within our communities to the highest standards, initiate engagement processes with our client base to build relationships and stay top of mind. As we adopt systems and processes to improve our foundation - the hope is, if we build it they will come. 'They' being the coveted client referral.

Are you vocal about referrals?

Clients need to know that you are open for business, accepting new clients. Clients also need to clearly understand and be able to communicate your value and your specialty. The clearer you are about what you offer and who can benefit from your help, the easier it will be for your client to tell their family members, friends etc.

Use the following *three questions to communicate your expertise*:

- What makes you different?
- Who is your target market?
- What areas of finance do you specialize in?



Michael Morrow, CFP

To learn why Mike is known as The Leader in Marketing Strategies™, contact us.

Catch a sneak peak of Michael's presentation

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CONTINUED

Are you reachable?

Is it easy for your clients to give you referrals? Client meetings are a perfect scenario to collect referrals. In my office, we always show our clients the letter of introduction that we send referrals. The letter of introduction introduces us to the prospect and describes the services we offer. We work from a template letter and customize it for each prospect. The most important aspect of the letter is the carbon copy: at the bottom of the letter of introduction we indicate that a carbon copy will be sent to the client. This builds credibility with both the client and the prospect and increases your chance of securing an initial meeting with the prospect.

*For a copy of our template, please email:
michelle@ideasforadvisors.com.*

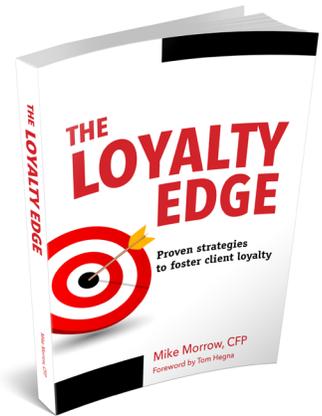
Every time a client gives you a referral, at a minimum a thank you note should be sent out. No matter what the outcome is with the referral. It shows professionalism, good manners and gratitude. The goal is to make the entire experience a positive one for both the client and the referral.

Referrals from happy clients are the #1 way to grow your business.

Mike Morrow, CFP, has been a Financial Advisor for 25 years. He understands the importance of client appreciation and the power of client loyalty. Mike is an International Speaker who shares his award-winning ideas all over Canada, the United States, Mexico, Poland, Asia, Australia and New Zealand and at Million Dollar Round Table events, including MDRT UK 2015, The 2012 MDRT Experience and The 2012 and 2009 MDRT Annual Meeting.

All of Mike's presentations qualify for CE credits

It's Coming!
Watch for Mike's new book.
May, 2015.
www.ideasforadvisors.com



"Mike's enthusiasm for going out of his way to deliver service to his clients and share that knowledge and experience with others is amazing. He is one of the most passionate people in this area I know, and having seen him speak several times, this is extremely evident, and the time you are with him never seems long enough. Several of Mike's ideas have been developed and put to immediate good use within my own practice."

*David Braithwaite,
DipPFS Managing Director,
Citrus Financial, England*

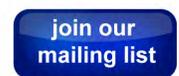
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