

Upcoming Events

May 26, 2010
11:45am – 1:30pm

Understanding Client Retention and Boomer Demographics
Financial Planning Association

University Club
Pasadena, CA 91101

June 7, 2010
10:00am – 12:00pm

Youth Career Day

John Muir High School
Pasadena, CA 91103

June 23, 2010
11:45am – 1:30pm

Helping Clients Increase Business Cash Flow while Reducing Credit Risk

University Club
Pasadena, CA 91101

July 28, 2010
11:45am – 1:30pm

New Perspectives on Portfolio Risk: The Economy Matters

University Club
Pasadena, CA 91101

August 25, 2010
11:45am – 1:30pm

Roth IRA's Financial Planning Association

University Club
Pasadena, CA 91101

September 22, 2010
11:45am – 1:30pm

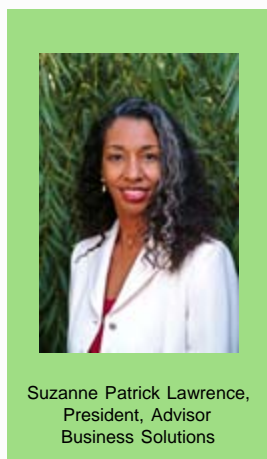
Donor Advised Giving Financial Planning Association

University Club
Pasadena, CA 91101

[See More Events...](#)

Referral Business Mindset

Everyone loves getting referrals, but expecting them to come regularly from clients or associates takes proactive planning. Having a referral-based mindset works best when you focus on ways to interact with clients proactively, striving for service excellence while engaging them to refer people who could use your products and services.



Suzanne Patrick Lawrence,
President, Advisor
Business Solutions

Consider ways to explain your marketing process, so your clients understand how you would reach out to referrals. Demonstrate what will be your next steps when provided referrals, what will be sent out and provide samples. This will engage people to understand your follow up and give them opportunities to ask questions. Keep them informed of any updates so they will be included in the follow up phases as appropriate.

Building awareness with your clients will generate more confidence and clarity with your new relationships, ensuring professionalism yet personal touch to each referred person.

Our Community

Helping prepare youth for “real world” experiences is an initiative we started in 2009. Our team recently held a fundraiser for John Muir High School Business & Entrepreneurial Academy in Northwest Pasadena.

The campaign called *Dress for Success* was sponsored by DeVry University and the City of Pasadena Northwest Commission to donate funds for low income students to purchase business attire and office supplies for job interviews, college interviews, internships and job shadowing who may not otherwise have the financial means.



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