

Marketing Inspirations

Practice Management Solutions

August/September 2011

Upcoming Events

AUGUST

18th Youth and Money, Back to School Event, Santa Anita Racetrack

24th FPA, Real Comprehensive Financial Planning—Do You Measure Up?

SEPTEMBER

6th-9th ASBDC Annual Conference

14th FPA Panel of Experts Planning for Retirement, National Assn of Women in Construction

15th Last Kiss of Summer Gala Second Chance Employment Services (SCES)

15th-18th FPA Annual Conference

28th FPA, How Community Foundations Can be Part of Your Legacy

OCTOBER

4th Winning Women Clients as Trusted Advisor, University Club

26th FPA, Economic Outlook
[See More Event Info...](#)



Communicating Calmness to Clients



Suzanne Patrick Lawrence
President

How are you connecting with your clients? There are many effective methods that will build client loyalty but you want to be especially proactive when times are volatile. Reach out to your clients before they panic and reach out to you or someone else for answers. Let your clients know that you have a handle on what the market is doing and talk to them in specifics making comparisons to other periods in market history. Don't leave them feeling bewildered and confused by speaking in generalities or by not connecting with them at all.

Just as it is imperative that you follow-up with your clients regarding their portfolios and dedicate the time to making personal connections, it is equally important to keep reaching out to them in good times and in bad. This not only gives them the confidence they need in you as their financial advisor but it creates a great opportunity for them to pass your name along to others in their network as a go-to person who has answers.

Determine the best ways for you to connect with your clients whether it is through email, by phone, cards, or person visits and make a schedule. Perhaps it makes sense to connect once or twice a month in normal times but when the market is so active as it has been recently, stepping up those personal touches may be just the thing your clients need and likely expect. The bottom line is that this is the time to be proactive; it is not the time to be reactive.

Coming next month: *Building Your Brand Through Social Media*

Client in the News

Womanpower/Second Chance Employment Services
President and CEO in Huffington Post 8/7/2011

http://www.huffingtonpost.com/ludy-green-phd/hire-veterans_b_920533.html

Are you meeting your professional and work/life balance goals for 2011? Our team offers personalized coaching to help increase focus, reduce stress and stay on track! Contact business@advisorbusinessolutions.com or call 562-439-4804 to schedule a 30 minute complimentary coaching session. Offer applies for appointments through September 2011.