Get Personal with your Clients and Prospects

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by Kristen Luke

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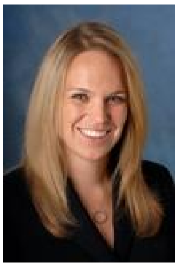

Anytime I explain what I do, there is some confusion.

No, I'm not a financial planner. I help financial planners market their businesses. To those not in the world of financial services or marketing, this is sometimes a confusing concept.

However, once my profession is clear, inevitably people want to talk about their financial planners with me. I always welcome this feedback because it provides me with further insight into what people are looking for in their financial advisor.

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It happened again this weekend.

I visited my aunt and uncle in Denver while I was in town for business. They are in their mid 50s, have two kids in college and own a business. For many of the advisors I work with, my aunt and uncle fit their target market.

In the interest of research I asked my uncle how he chose his advisor. He went through his history of working with a broker who had no idea who he was, another firm who was not transparent about fees and finally his current planner who he has been working with for the last year and a half.

I was looking for specifics, so I asked my uncle how he met his current advisor. He said that his advisor came into his shop to purchase a piano (my uncle owns a piano sales and restoration business). They found they had several common interests, so they kept in touch. They had dinner at each other's houses and the advisor even accompanied my aunt and her friends on their annual 18 mile hike across the Continental Divide. They connected on a personal level before initiating a business relationship. In fact, my aunt and uncle already had plans to have the advisor over later this month to play music and have dinner together.