

Growing your business with referrals from women clients

It's easy, just say:

"Since you are a valued client, I would be happy to talk with any of your family, friends or colleagues when they have questions about investing or life insurance. Please keep me in mind."

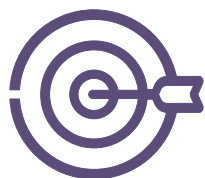


See reverse for actions you can take to generate referrals. ↪



INVESTMENTS

Actions you can take to generate referrals



1. Always deliver

Always meet client expectations, whether it's deadlines, details or presentation. The more reliable you are the more referable you are.



2. Ask for introductions

As you build trusted, valued relationships, your female clients will be eager to help you. Don't be afraid to ask them directly if they have friends, colleagues or family members who would be a good match with your services. Understanding their networks and making yourself available to help with questions can yield valuable referrals.



3. Focus on beneficiaries

In every policy you write or service, there are designated beneficiaries. Learn about them from your clients and ask if you can contact them. Reach out and explain all that you have to offer. By building relationships with beneficiaries, you will gain new clients and retain family assets for the long term.



4. Exceed expectations

Surprise your women clients by going the extra mile to help them celebrate an occasion or resolve an issue. When you earn their trust and impress them, they'll brag about you. That turns into referrals without even having to ask!