

EVOLVE

Women & Investing:
Ideas and best practices collected from
advisors like you!



A female client is likely to refer to a financial advisor 26 times in her lifetime, whereas a man is likely to refer a financial advisor only 11 times in his lifetime.*

Events

Idea #1

Host financial education seminars for women covering content related to:

- Planning for retirement
- Women's financial boot camp
- Organizing your financial life
- Identity theft prevention
- Stock ideas that appeal to women
- Empowering mothers to financially educate their children
- Insurance planning for longevity
- College funding for grandchildren
- Host a female economist
- Feature a Social Security speaker

Idea #2

Host social events with financial information as a portion of the event:

- Wine, cheese, olive oil, and chocolate tasting nights
- A "Women and the Arts" event featuring local female artists
- A Valentine's Day luncheon for single female clients and their friends
- A health-oriented workshop, including topics like self-defense and women's health
- "Fashion and Finance" shopping nights highlighting women-owned businesses
- A women's golf pro combined golf clinic with a financial presentation
- Romantic Comedy movie viewing
- Mother's Day gardening events

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Professional Networking

- Volunteer at professional and civic organizations where women are leaders
 - Connect with divorce attorneys and demonstrate your planning capabilities directed to women going through life transitions.
 - Get involved in charities you believe in. Network with women who serve on boards and are involved in community work.
 - Be available to talk to women's groups at churches, retirement communities, community centers, etc.
 - Get to know mothers, sisters, and daughters of clients.
 - Recruit female COI's, CPA's, Family Practice Attorneys, CEO's, CFO's and small business owners for your Advisory Board.
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Gifts

- Subscriptions to digital magazine or streaming services (e.g. health and fitness, Audible, etc) – keeps your name in front of clients every month!
 - Themed gifts around hobbies or vacations.
 - Send gifts for births, birthdays, retirements, anniversaries and other special occasions.
 - Host smaller, more intimate birthday lunches or dinners with clients and their friends.
 - Give umbrellas, chocolate, stationary, wine glasses, etc. with logo.
 - College shirt/sweatshirt when a child or grandchildren enrolls in college.
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IMPORTANT INFORMATION

*Kathleen Burn Kingsbury How to Give Financial Advice to Women. Page 25. "According to Delia Passi, author of Winning the Toughest Customer: The Essential Guide to Selling to Women."

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First used: May 2013 / Updated: May 2022 / Expiry: May 2024 RIFIS 24841

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