

HOW IT'S DONE



Female Friendly To-Do List

How many single women clients do you have (includes divorced and widowed)? _____

What percentage of your total clients are women? _____

What percentage of your couple clients do you know the female spouse well? _____

Have you decided for the spouse that she does not need to be involved in client meetings or communication? Yes No

The next time you meet with a woman client or a client couple, ask them: "What is one thing I can do to improve our relationship? What do you like best about working with me?" _____

What opportunities might there be with the mothers, daughters and sisters of your existing clients? _____

Conduct a survey of your women clients to find out ways you can improve your practice and make it more friendly and attractive to women. Yes No

Do you have email addresses for all of the women in your database? Yes No

Consider setting up an educational event just for your women clients Yes No

Consider adding more material targeted to women on your website. Create links to other women friendly websites Yes No

Revise your sales process to make it more female friendly. Yes No

Consider creating women groups within your clientele. The focus should be social, educational and to create networking opportunities for everyone. Yes No

Create meeting agendas Yes No

Have you connected with the couples (woman's) other advisors (lawyer, CPA etc.)? Yes No

What can you do to improve the connectivity with the client's family?

Top Five Concerns of Women over 50:

1. Feeling Financially secure
2. Having a Comprehensive Plan in place
3. Retirement Planning
4. Outliving my Money
5. Getting out of debt