



The Challenge

The first challenge is that affluent client expectations are high and growing. They are used to regular engagement across different parts of their lives and it is increasingly personalized, bringing them new information and opportunities given the power of what today's social media platforms know about them. This is the new normal that advisors operate in. The second challenge is that advisors are only getting busier, so providing this type of engagement is not easy.

The Opportunity

Having a proactive strategy in place for communications with clients pays dividends in multiple ways—three in particular. First, when clients hear from their advisor on a regular basis it indicates the value placed on that relationship and reinforces that the advisor is there to help them in any way possible. Second, it simply opens the door to a two-way street of communication, and clients will feel more comfortable sharing any news or events in their lives that may affect their finances. Third, it encourages relationship-building that goes well beyond client review sessions.



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There is no **secret** I simply **showed** my plan to 1,200 people. **900** said no and only 300 signed **up**. 85 actually did **something** but **only** 35 were serious and out of those **33**, 11 **made** me a multi-millionaire.

BILL GATES

American Business Magnate

NOUVEAU TYCOON

Insights for Advisors

In addition to your regular client and prospect engagements, advisors need to have programs in place that reach out throughout the year, deliver value and promote engagement at the times that matter the most, supporting regular engagement and spontaneity. This reinforces the advisors value proposition and brand, their personal deep relationships.

MyMoneyRoadmap® provides advisors with a platform for automating this type of sustained engagement and helping the advisor better see those instances that will matter most.

Learn more: <http://www.mymoneyroadmap.com/advisor>

Source: <http://proactiveadvisormagazine.com/18-touch-points-per-year-can-solidify-client-relationships/>