



CELEBRATING HER PASSIONS

Create meaningful opportunities to connect with a community of women

Top advisors work hard to create strong connections with women. They do so in part by creating a place where women feel comfortable and heard when talking about what they want from their financial advisor and what's important to them financially. One way to generate such an environment is to plan client and prospecting events that celebrate women and their passions.

Consider the following ideas to jumpstart your thinking. Or, ask some of your most trusted female clients what they want and incorporate them in the planning process. Advising is all about connecting and creating community, so why not leverage help from your inner circle.

A DAY OUT WITH FRIENDS

Invite female clients and their best friends for an afternoon event (e.g., a round of golf or a tea party). During the event, “tee/tea up” a celebration of long-term clients and give guests a party favor pack containing helpful resources that can drive home — or put on a silver platter — financial success.

KEEPING CURRENT ON TRENDS

Reach out to a locally stylist or boutique owner and offer to host a private luncheon followed by a fashion show. Use this opportunity to talk about the importance of understanding trends while keeping timeless essentials in your arsenal to ensure you're prepared for any kind of market or weather.

MEN ARE FROM MARS, WOMEN ARE FROM VENUS

For a fun couples' event, offer a humorous presentation about differences between how the two genders approach planning. Provide an activity that asks attitudinal questions about all aspects of finance, and show women that it's possible for the stars to align across life, legacy and love.

I HEART FINANCIAL STABILITY

Partner with a local baker to host an annual cookie decorating event celebrating Galentine's Day with your single, divorced and widowed clients. In addition to the camaraderie, they'll walk away with some tasty treats as well as sweet resources they can use to check up on their financial fitness and savvy.



STRETCH YOUR FINANCES FURTHER

Hire a local instructor to help you host a themed yoga class or bootcamp. Carve out parts of the day to discuss the importance of evaluating fiscal fitness, budgeting to stretch one's savings, and valuing a cool down period when one transitions from accumulation to decumulation as they enter retirement.

MOTHER-DAUGHTER SAFETY & SECURITY

One of a mother's greatest concerns is her daughter's safety. One of a daughter's greatest concerns is someone taking advantage of her elderly mother. Meet the next generation of clients during this event while an expert addresses key topics like credit card and identity theft prevention and asset protection.

GRANDMAS' BABYSITTER BOOTCAMP

A lot has changed since older female clients have had young children. Invite a firefighter, police officer and lifeguard to coach clients on how to successfully care for their grandchildren. Compare the evolution of caregiving to finance, and provide a legacy planning-themed activity to close it out.

ANTI-AGING WORKSHOP

Find a local life coach versed in holistic health and wellness to take female clients on a mindfulness journey. Talk about tips for living longer, maintaining energy and managing life's stressors. Offer resources for helping clients organize their finances to take one particular burden off their plate.

BE THE BOOK CLUB EXPERT

Ask current female clients who participate in a book club if you could host their next meeting. Provide copies of a financial fitness book that underscores your planning approach, and cover dinner or delicious snacks for attendees. Open it up to "ask the expert" and share a planning resource as a helpful extra.

THE POWER OF GROWTH & RENEWAL

Invite recently divorced and/or widowed clients to a local nursery for a look at potting tips and techniques for various types of flora and fauna. Allow each attendee to create their own special pot, planting the seeds for their new beginnings, and provide support as they transition on their life journeys.

BEAUTY IN THE ART OF INVESTING

Make arrangements at your local museum for a guide to lead your clients on a private tour or through a special exhibition. Follow it up with lunch at the museum or on the lawn where you can give away branded paint palettes while discussing the power of blending colors and strategies for desired outcomes.

ORGANIZE YOUR LIFE

Go Marie Kondo on your clients or prospects and hire a professional organizer to share tips and techniques for alleviating messy burdens in their homes and in their lives. Talk about the power of getting a handle on your finances, and share copies of a budgeting worksheet and financial organizer.

