The Advisor's Edge

Sales Strategies You Can Use

Why Do Your Clients Leave?

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I've been in this industry for more than 20 years and every year, companies conduct surveys to find out why clients typically leave their financial advisors. As far back as I can remember, the #1 reason each year has been the same: ***lack of communication***.

While many states still have working restrictions in place, and the markets have seen unprecedented volatility in the last three months, those are not reasons to be hiding out in your home office, afraid to pick up the phone. It's just the opposite, if you are THE advisor who is proactively reaching out to your clients. You are standing out from most other advisors out there. You don't even need to be calling them with the newest, hottest stock tip...you just need to listen. Listen to the concerns that they have right now. Tell them that you have processes and procedures in place to address just about every situation confronting them. Reassure them that, unless they need 100% of their retirement nest egg right now, you have programs that can help to resolve their current concerns. Chances are that they will have the same concerns as most Baby Boomers in this country:

- *How can I protect my money from losses?*
- *How can I minimize the increased volatility in the marketplace?*
- *How can I create a guaranteed income stream that I can never outlive?*

Settle those concerns with First American. We partner with over 30 insurance companies. Most offer index annuities that can eliminate any losses in a portfolio due to market performance, minimize the ups-and-downs of the market with vol-control indices, and provide clients not only with an income they will never outlive, but also have the potential to give them a pay-raise...*even in retirement.*

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