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The Professional Referral Method: Becoming the Trusted Advisor

Program Description

In today's challenging environment, advisors are increasingly marketing not only to clients, but also to professional intermediaries who serve as gatekeepers to wealthy families. To accommodate this shift, advisors must change their messaging from one that is valuable to one that is referable.

This program offers four specific strategies for executing a messaging process to this new market. It provides instructions for creating warm introductions to professionals, then teaches how to develop a referable message, structure a presentation for an intermediary and close a meeting for an action.

Topics include:

- The difference between a valuable message and a referable message
- A four-step process for managing outreach to gatekeepers
- How to create a referable message
- Scripts and guidance for scheduling and managing meetings

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