

Top referral tips for financial professionals



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Referrals are key to building your business. Ironically, while asking for the business is a basic sales skill, asking for referrals is often overlooked. Here are a few ways to make it easier.

Presentations

Work with local organizations to do high-level presentations on financial planning and allow time for questions and answers. This gives prospective clients the chance to talk with you and decide if they'd like to do business with you. Be sure to bring business cards and/or other information they can take home. You may also want to consider a post-presentation survey that would keep you in front of potential clients.

If you're considering presentations, target local organizations, especially those whose members are likely in your target market. You could also consider offering to talk to the employees of companies in town, especially if you have a strong network among human resource professionals.

Network with other professionals

Build your own network with other professionals such as accountants, attorneys, or insurance agents. They likely have clients who have needs beyond the scope of their expertise. How can you be the one a trusted professional refers them to?

Ask

Of course, one of the easiest ways to gain referrals is to have a business worthy of referrals. When you have a productive client meeting or have solved a specific problem, consider if that's a good opportunity to ask for the referral. Check in on the relationship by asking how you've provided value, and follow up by asking who else might benefit.

Say thank you

While asking for a referral is important, expressing gratitude may increase the likelihood you will get additional referrals. Show your appreciation—not just for the business, but for having enough trust in you to recommend you to others.

Remember, as Brett Van Bortel, author of *The Whole Client Model*, says, "Client referrals are usually critical for financial professionals wanting to build a substantial high-net-worth clientele. Moreover, being systematic about garnering such referrals is critical to getting them."

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