**The Ultimate Guide to**

**Create Relationships with**

**The Adult Children of your HNW Clients**

A significant percentage of financial advisors do not have a meaningful relationship with their clients' adult children.

Limiting beliefs include; "It's too challenging and time-consuming to create meaningful relationships with my client's adult children."

Why are these results happening?

* 66% of adult children fire their parents’ financial advisor after they inherit their parents’ wealth
* 88% of those who chose not to work with their parents’ advisor never even considered doing so
* 75% of investors say their adult children have never met their advisors
* 50% worry that their children will lose the wealth their family built
* 20% agree that their adult children are well prepared to handle family wealth
* 70% of wealthy families lose their wealth by the 2nd generation

Tomorrow is too late as 60% of affluent investors met their first financial advisor before 45 and one-third before they were 35.

Successful Relationship Marketing To The Adult Children Of Your Higher-Net-Worth Clients requires understanding and implementing:

1. Create an Intergenerational Value Proposition to be used for Meetings / Speaking, Brochures, Direct Mail Letter / Postcard, Email Campaigns and Website
2. Implement 8 Steps to Segment Current Clients & Adult Children
3. Develop the All About You and Your Children Discovery Process
4. 7 Steps to help your Clients Understand the Value of Multigenerational Risk Management and Investment Planning that lead to Adult Children Introductions
5. Create Key Steps and Strategies for Successful Family Meetings
6. Upgrade Technology
7. Create / Research Intergenerational Clients Interest Content Marketing for Direct Mail Letter / Postcard and Email Campaigns
8. Implement a Personalized Intergenerational Social Media Campaign
9. Create a Client Gifting Program
10. Create and Implement an Educational & Theme Event Plan
11. Write Job Description & Hire Client Relationships Manager

Join Simon Reilly of Leading Advisor, an expert speaker, author, and business coach with 20 years of experience working virtually with financial advisors. Simon is an Advocis, FPA, GAMA, MDRT, NAIFA, NAILBA, TEDx and WIFS Speaker. Learn how to write a clear, concise, and profitable plan to retain your clients by building a solid relationship with the adult children of your clients.