Karel - Gordon & Associates

PENSION CONSULTANTS, PLAN ADMINISTRATORS AND ACTUARIES

Advisor Connect | Answering the "Why Us?" Question

MAKING IT ACTIONABLE

From the perspective of many business owners, most financial advisors provide similar services and say many of the same things. They have similar designations after their names and similar resumes. But as you know, not all financial advisors are like you. ***The key is being able to explain why.*** It's more than recommending a course of action, it's answering why they should do it with ***you***.

While experience matters, clients care more about ***how you will use your knowledge, how you will tailor an approach specifically to them,*** and ***how you will guide their company and their employees*** in making important decisions about their future.

Here are five topics to help you showcase the special qualities that will make it obvious why **YOU** are the best choice to help them with their retirement plan.

1 **Focus on Outcomes:** Focus on the solutions and the outcomes you help drive, rather than on the services and products you offer. Explain concepts in simple, straightforward language.

2 **Bring the Team:** You aren't just selling yourself, you're bringing an "A" team to the table. Discuss how collaboration with expert attorneys, CPAs, and TPAs and recordkeepers results in the best outcome. While you may not personally have all the answers, you know the people who do.

3 **Embrace Your Client's Uniqueness:** Because it's not a one-size-fits-all world, demonstrate how you and your partners will create a customized plan to optimize participation, tax efficiencies, and positive outcomes. Proactively suggest opportunities to benefit the company and its employees.

4 **Commit to Communication:** It’s easy to forget that the rules and regulations, the jargon, and choices you take for granted everyday are still pretty foreign to many of your clients and prospects – even if they don’t admit that to you out loud. Demonstrating to them that communication is an essential element of your partnership with them will encourage confidence in trusting you with one of their most important assets.

5 **It’s About the Long Term:** Your orientation to be a partner for the long term will help set you apart. Explain to your clients how your goal isn’t just to win their business, but to be a partner in their long-term success. You’ll be there to help guide and grow their retirement plan so they can focus on growing their business.

Highlighting your approach to helping clients achieve the outcomes they seek for themselves and their employees will set you apart from the pack and form the foundation to help you grow your business—and theirs. Give us a call to talk about how we can help.