

Are you as female friendly as you think?

How you interact with women in general

1. When you meet with a woman (any woman), have you ever multi-tasked – answered the phone, checked an email, let your assistant interrupt you, excused yourself to do something else? Yes No
2. Have you ever attended the funeral of a client? Yes No
3. Have you ever visited your client at their home because it was more convenient for them? Yes No
4. Have you ever referred a client to your a female client without expecting anything in return? Yes No
5. Have you ever had to call a female client in a couple to ask her if anything was wrong with her husband (e.g. dementia)? Yes No
6. Have you ever invited a female client who is an executive or professional to speak at a function you were involved with? Yes No
7. Have you ever helped a client get a lawn service provider or mechanic or doctor (non financial referral)? Yes No
8. Have you ever helped a client buy a new car by going with them to the dealer? Yes No
9. Have you ever written the son/daughter of a client a letter of encouragement when you heard they had lost their job? Yes No

How women interact with you

10. Do you get a holiday/birthday card from any of your female clients? Yes No
11. Have any of your female clients given you a referral to a new client in the last 12 months? Yes No
12. Has a client ever attended the funeral for someone close to you to show their support? Yes No
13. Do your clients call you to let you know they are selling their home? Yes No
14. Do your female clients know more about you than you know about them (on personal level)? Yes No
15. Has a female client in a couple told you a “secret” about their family that counters what her husband told you? Yes No

How you manage your practice

16. Do you have a pleasant entrance to your practice where clients can be comfortable as they wait to meet with you? Yes No
17. Do your clients ask most of their questions to your sales assistant rather than you? Yes No

StrategyMarketing.ca

18. When meeting with a female client, have you ever taken thorough notes that cause you to look down a lot? Yes No
19. Have you ever held an event for female clients/prospectsthat wasn't about investing? Yes No
20. Have you held a client event where more women than men attend? Yes No
21. Did the female clients bring a friend to your event? Yes No
22. Do your female clients (singles) pay slightly more than your male or couples clients because they don't ask for a lower price? Yes No
23. Do you know the exact number of female clients you have? Yes No
24. And, how much in assets they represent? Yes No
25. Do you know which of your female clients are single by choice? Widowed and lonely? Divorced and anxious? Separated and trying to cope? Yes No
26. Generally speaking do you serve women in pretty much the same way as you serve men that are clients? Yes No

How you engage women in financial matters

27. Have you ever said, "don't worry about that" to any female client? Yes No
28. Have you ever advised a client about how to make up the income lost through a maternity leave? Yes No
29. Is the retirement plan you create for a couple primarily based on the woman's needs rather than the man's? Yes No
30. Has a female client told you she doesn't understand investing very well? Yes No
31. Did you offer to help her understand more by spending time explaining things to her? Yes No
32. Have you ever used a term that a female client didn't understand and had to ask you to explain it? Yes No
33. Have you discussed spending as part of your role as a woman's financial advisor? Yes No

24-32 Yes's – Congratulations! You're a superstar!

15-23 Yes's – You're pretty good but there are still a few things you could learn

10-14 Yes's – You need help. Get help to learn how women want to be served.

0-9 Yes's – Boy! You need the most help!

Enrol today in [The Art of Attracting Female Clients](#) and make 2018 your best year ever.