



3 THINGS WEALTHY PROSPECTS DEMAND

THAT MOST ADVISORS OVERLOOK

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The key to success as an advisor lies not only in how great of an advisor you are, but also in your ability to offer much-needed services that other advisors may be overlooking.

If you are not providing your ideal clients what they actually want, you are at a great disadvantage. So what might some of those things be?

[Read on to find out.](#)

THESE THREE PRINCIPLES – AS IDENTIFIED BY SOME OF THE TOP-PRODUCING ADVISORS IN THE INDUSTRY – ARE ESSENTIAL TO RETAINING CLIENTS AND WINNING BUSINESS.

1. Communication on a timely basis:

The number one reason clients leave their advisor is not due to lack of returns, but lack of communication. It seems extremely simple, but can be one of the most difficult things to stay on top of – especially as your client list grows. Staying in touch with clients on a regular basis is essential to keeping their business.

2. Easy to understand financial updates:

No one wants to read complicated industry lingo. Clients simply want to know "What do I have?" ... "How am I doing" and ... "What am I paying for?" Yet, most advisors never keep it that simple.

3. Safety:

Let's face it – no one likes the thought of losing money, yet many have no plan in place to shield themselves from the next market correction. A proven strategy put in place ahead of time can provide clients the peace of mind they need.

WealthGuard is the one simple tool that delivers solutions to all of these issues and helps you fill a pipeline of future prospects.

The best part is that it doesn't cost you or your client a dime. WealthGuard is also completely automated, so it's a breeze to use. This allows you to work smarter, not harder.

For example, imagine meeting with a prospect that has multiple accounts through a competitor. In many instances it can be a challenge to convince prospects to move all their assets at once. What if you had the ability to offer a free service for those held-away accounts that provided better communication, cleaner updates, and extra safety all without having to move their accounts right away? How many prospects would take you up on that?

The ability to give clients exactly what they want with no strings attached gives you the best opportunity to manage all of their accounts in the near future. This is just the tip of the iceberg when it comes to the value of WealthGuarding accounts.

[Visit wealthguard.me](https://wealthguard.me) or call (888) 562-8880 (option 2) to learn more.