

WINNING WITH WOMEN

Ideas for Connecting With Women

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Successful events used by top advisors

Women have unique needs and perspectives, so tailoring solutions to meet those needs can help you retain your women clients and gain new ones. Listed below are initiatives from some top advisors in the industry to help you connect with women about their life concerns.

Mother-daughter digital safety and security	With all the benefits the digital world has to offer, it's easy to overlook the risks. Host an event for mothers and daughters that offers ways to keep their families safe and secure online. Cover topics such as online rights and responsibilities, the savvy use of social media and identity theft.
Donation drive	Organize a used clothing drive to help those in need. Invite your female clients to a kickoff event and ask them to bring an item for donation. Encourage them to bring a friend as well so you're not only getting a prospect opportunity but also increasing the number of donations.
Clients with aging parents	Caring for an elderly parent can be overwhelming. Provide tools and resources to help tackle the tough issues, such as paying for care, finding appropriate housing and talking about money.
CPR seminar	Invite a firefighter, police officer or lifeguard to coach your clients on how to respond in emergency situations.
Fiscal fitness with a trainer	Hire a personal trainer to speak to your clients and their women friends about strength training and physical fitness. Or host a yoga or spin class. Use this as an opportunity to make a connection to fiscal fitness concepts.
Leveraging your clients' clubs	You may have clients who belong to a particular club. Invite them to bring a friend from their club to an event so they can experience it together. For example, consider a cooking class that teaches how to prepare healthy meals.



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Art, travel, books	Find a local bookshop that offers lectures and invite your clients to one about travel. Or invite a local author to speak at a luncheon. Another option is to make arrangements at a local museum for a private one-hour tour. Then have lunch and talk about “the art of investing.”
Anti-aging techniques and tips	Host a workshop that addresses how to look younger, live longer, maintain energy and manage life’s stressors.
The ultimate triathlon: Mother, wife, executive	Invite a life coach to speak to working women about how to maintain the work–life balance. The coach can conduct exercises and drills, use self-probing questionnaires and touch on helping these power players redefine their purpose.
Savvy women, smart investors	Women are faced with unique financial pressures, whether they are raising a family, caring for aging parents or saving for their own long-term goals. Host a seminar to discuss these challenges and offer strategies and tips specifically geared toward women.

For help with this and any other business-building ideas, please call your MFS® partners at 1-800-343-2829.

Please follow your firm’s approval process to obtain approval for any sales ideas or marketing materials you would like to use with clients. This includes checking with your firm about industry rules and regulations regarding gifts and entertainment before initiating any events.

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