

REFERRALS

The Professional Way

10 Strategies for Networking with Top Clients & Centers of Influence

One of the greatest lies in our industry is, *“Referrals are easy...all you have to do is ask for them!”*

The truth is referrals are one of the most difficult things you will ever do, especially given the old-fashioned and clumsy techniques we’ve been taught. It’s time to learn a new way...a process that recognizes and reduces the fear top clients feel about referring. This is a totally modern approach that resonates with top client and centers of influence like CPAs or attorneys. It can change your business!

In this program you will learn:

- ▶ A new framework for the entire referral concept (hint: they’re not about you)
- ▶ Why you need to stop “begging for names” and position referrals from strength
- ▶ How to build a pro-active referral plan that puts you in total control of your future
- ▶ How to understand and overcome your own legitimate fears of asking
- ▶ How to get more referrals from CPAs, attorneys, and other centers of influence
- ▶ What to say (and NOT to say) when a client says, “I can’t think of anyone.”
- ▶ How to bring up referrals with a brand new client in a way that makes sense
- ▶ How to stay on your client’s radar screen and capture more “bird dog” referrals
- ▶ How to build your brand identity and make your entire team more referable
- ▶ How to go to your long-term clients and ask for referrals without looking like business is down
- ▶ How to create a customized Referral Guide that opens doors with centers of influence
- ▶ How to deal with the unspoken referral objections and make client fears go away

A few advisor comments

“This was the best combination of information and presentation I’ve seen in my 26 years as a Merrill Lynch FA!”

“Thank you...this helped me more than any training program I’ve ever attended.”

“Extremely relevant...Frank was both informative and inspiring!”

“Climb Mt. Everest and at the top you will find Frank Maselli teaching Financial Advisors how to grow their business!”

“Awesome, upbeat and inspiring!”

“Frank’s message is profound, funny, accurate and timely and his delivery is electrifying!”

“The man knows the business. He will rock your world!”



Frank Maselli is a former U.S. Army officer and a 35-year veteran of the Financial Services Industry. He’s written three best-selling books and trained thousands of advisors in advanced marketing techniques. Frank helps advisors grow in a modern way and have more fun doing it. He captivates audiences with intelligence, passion, and humor that inspires people to action! He’s been voted as the “Top Industry Speaker” for 7 straight years!

