



4 TIPS FOR SERVING YOUR WOMEN CLIENTS AND PROSPECTS

WOMEN HAVE MORE ECONOMIC POWER THAN EVER

Despite their economic impact, women report dissatisfaction with financial services providers.¹

- 91 percent feel that financial providers focus more on selling to them than educating them.
- 76 percent say the industry does not consider their best interests.
- 71 percent feel financial service firms are out of touch with women's needs and concerns.

Not surprisingly, women have become skeptical and distrustful of the financial services industry as a result.

SO WHAT DO WOMEN WANT?

To fully own their financial future, women want a trustworthy financial partner whose first objective is to educate.

When serving your female clients:

- Understand that women today have busy schedules with many demands.
- Recognize their needs and respect their roles as wage earners and decision-makers.
- Appeal to their need for research, information and education.
- Treat them as intellectual equals.

1 McGrady, Vanessa. "Survey: Women Feel Disconnected from Financial Services Companies." Forbes 17 March 2016.