



How to get Wealthy Clients

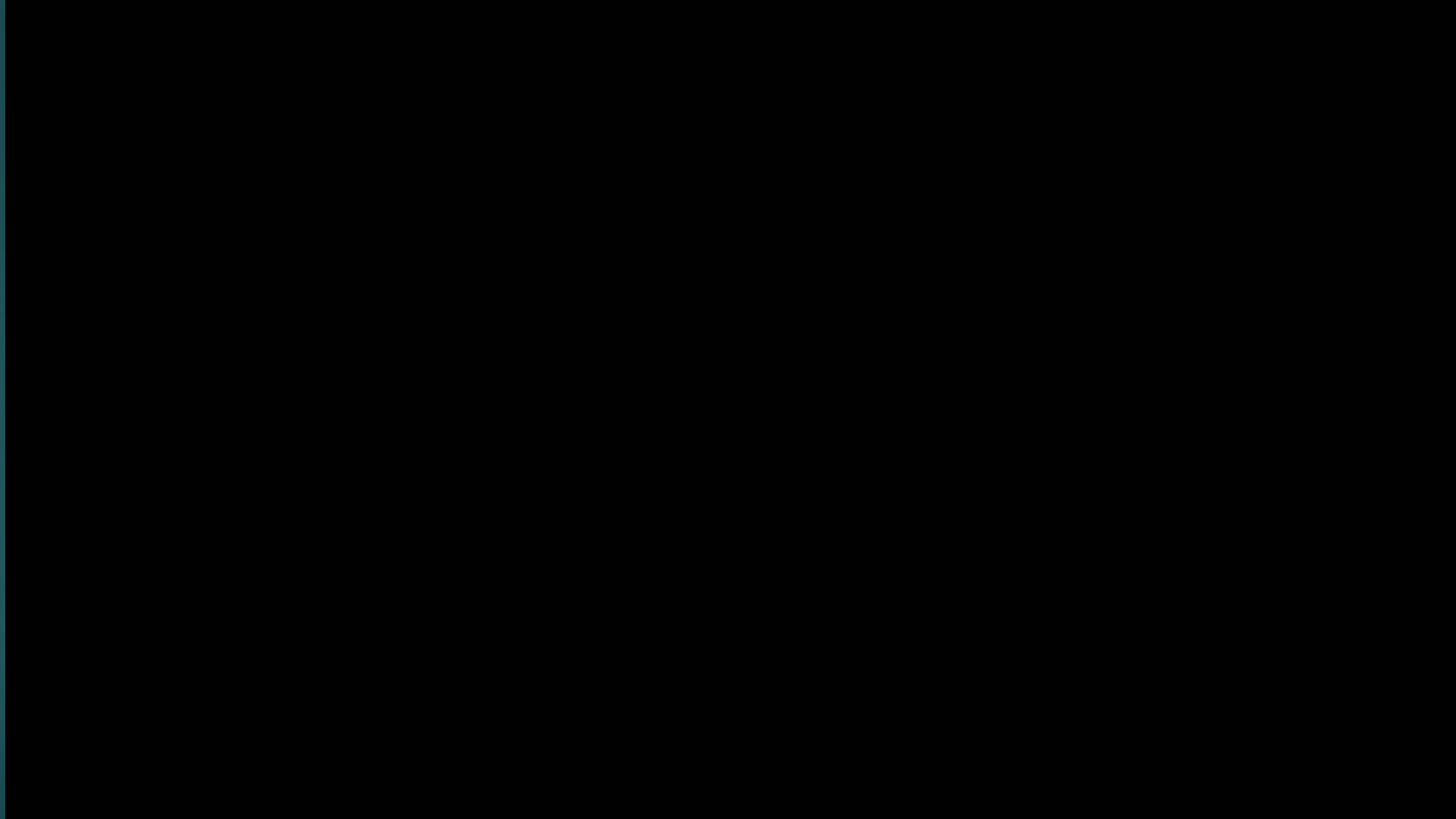
VISHAL DHAWAN

PLAN AHEAD WEALTH ADVISORS

Wealthy Clients

- ▶ Definition of Wealthy clients varies
- ▶ Wealthy by Assets – Investible assets Rs. 1 crore+
- ▶ Wealthy by income – Rs. 36 lakhs +
- ▶ Wealthy by inheritance potential – Rs. 3 crore+

Wealthy Clients...need to be understood



Wealthy Clients...

- ▶ Think Different, expect different
- ▶ Mostly Self made
- ▶ Seek solutions not products
- ▶ Focus on the big picture
- ▶ Dislike sales people
- ▶ Hate taxes
- ▶ Love process
- ▶ Must have “Confidentiality”
- ▶ Like to deal with equals

What the Wealthy Want...from you?

THE "I" SKILLS



“I Know” Skills

- ▶ Comprehensive knowledge of economy and markets
- ▶ Full understanding of my family’s goals and needs
- ▶ Information of any events that might impact my family’s finances
- ▶ Match my investment performance expectations
- ▶ Using specialists to help with other financial areas



“I Care” Skills

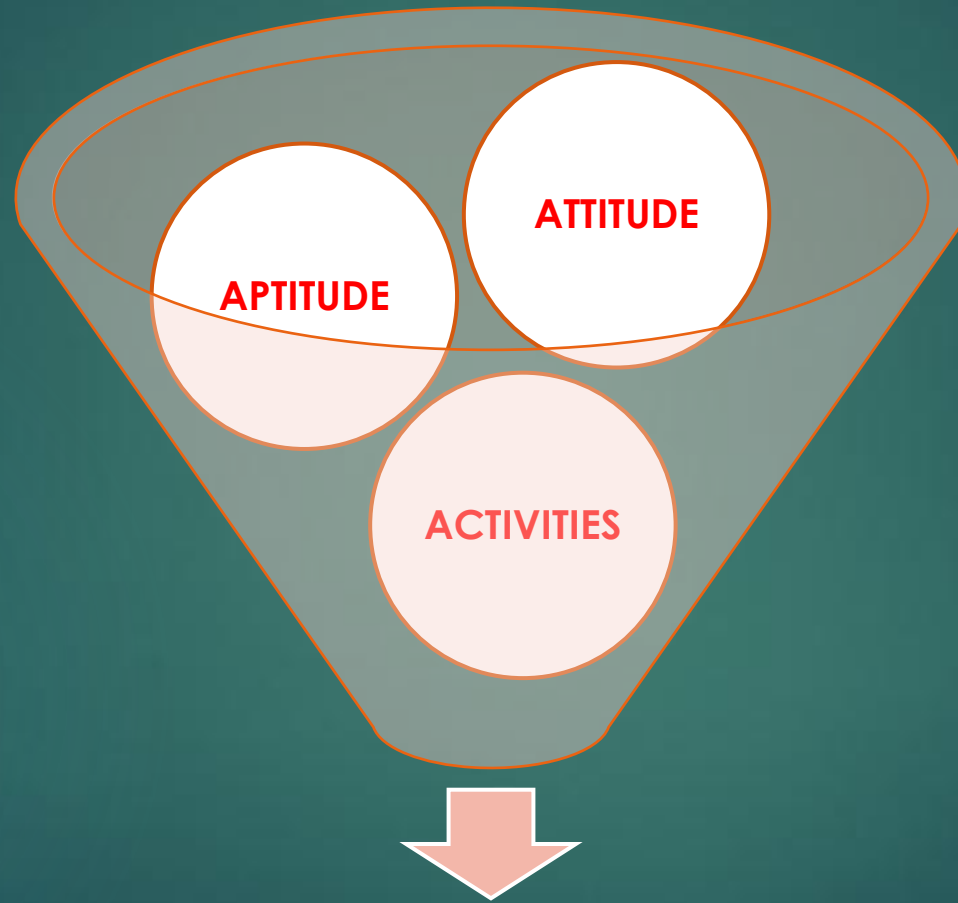
- ▶ It's about me, not only my investments
- ▶ My family comes first ! Not marketing your practice
- ▶ My family's best interest behind every financial recommendation
- ▶ Conversations about financial matters, not only investments



“I Do” Skills

- ▶ Clear and timely communication
- ▶ Quick problem resolutions
- ▶ Transparency including fees / commissions
- ▶ Keeping my financial documents organised

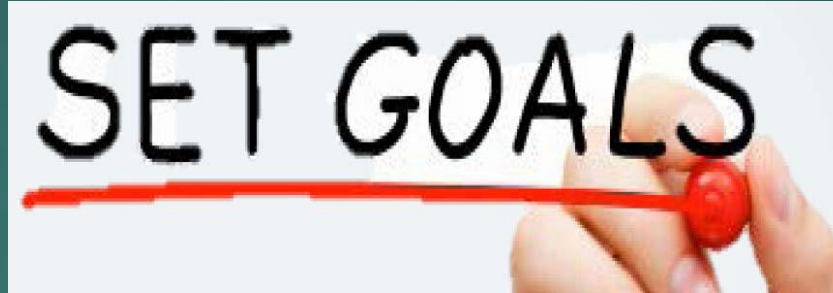
Recipe to get wealthy clients



Wealthy Client

Attitude

- ▶ Setting Goals
 - ▶ Sales
 - ▶ Networking
 - ▶ Self Upgradation
- ▶ Turning MS excel into reality
 - ▶ Doing planned activities, meetings
- ▶ Do what needs to be done
 - ▶ Regardless of what you think
 - ▶ Or how you are feeling



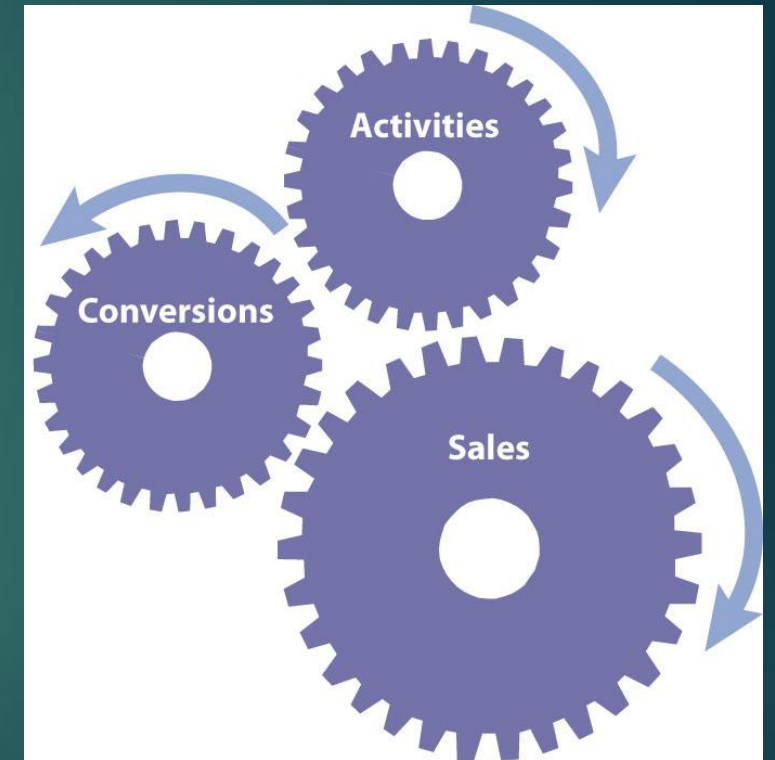
Aptitude

- ▶ Invest in Yourself
 - ▶ You are a walking talking ad of your work
- ▶ Know your proposition
 - ▶ what's unique, different, special
- ▶ Allocating your SD budget
 - ▶ Soft Skills
 - ▶ Knowledge of economy, global and local markets
 - ▶ Be a specialist in something



Activities

- ▶ Activities today = Revenue tomorrow
- ▶ Focus on the High Impact Activities
 - ▶ Referrals into introductions
 - ▶ Ask for a specific introduction
 - ▶ Strategic networking
 - ▶ Get involved and earn professional respect
 - ▶ Strategic referral alliances
 - ▶ Engage the law of reciprocity



Thank You

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