

## IMPORTANCE OF CLIENT RETENTION

*Multi-channel, personalized approach*

You have worked hard to build relationships to create loyalty with your clients; and as a result you have likely benefited from it by receiving referrals from satisfied clients. The challenging times we are all faced with has made client retention more important than ever.

### LET'S TALK FINANCIAL WELLNESS®



#### Why Let's Talk Financial Wellness® Works

Deliver consistent, educational information to your valued clients and prospects through a turnkey, automated program. This program helps to promote you (and your team) as the trusted financial professional, especially during uncertain and challenging times.

#### By the Numbers



Increasing customer retention rates by 5% can increase profits by 25-95%.<sup>i</sup>



It costs anywhere from 5 to 25 times as much to acquire a new customer then to retain an existing one.<sup>ii</sup>



Leverage cross-selling opportunities; existing customers are 50% more likely to purchase additional products.

To learn more about the program, please call  
800-243-5334 or email [sales@ltmlclientmarketing.com](mailto:sales@ltmlclientmarketing.com).  
<https://letstalkmoney.com/financialWellness/>

<sup>i</sup>Bain & Company. Prescription for cutting costs.

<sup>ii</sup>Harvard Business Review. The Value of Keeping the Right Customers.