

IMPORTANCE OF CLIENT RETENTION

especially during market volatility

Client retention is one of the keys to running a successful business. During times of market volatility, it can bring into focus how much emphasis has been placed on client retention and building those important client relationships for the agency. During times of uncertainty, being there for your clients can help build stronger relationships as you help them navigate and stay focused on their long-term goals.

According to *Financial Advisor Magazine*, the number one reason clients leave their financial professional is due to a lack of communication. Everyone is busier these days, so the key is to automate your communications while still making them feel personal. With a little upfront planning, you can stay-in-touch with your clients and prospects through consistent communication, even through volatile and challenging times.

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.

By the Numbers - Why advisors lose clients



72% failed to communicate¹



51% failed to understand goals and objectives¹



44% failed to return phone call promptly¹

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

¹Financial Advisor Magazine, *Five Reasons Clients Fire Their Advisor*.