



GREENE
CONSULTING

The Client Experience Company for Financial Services

Deepen and Expand Client Relationships During Crisis: 3 Key Questions to Address

At Greene Consulting, our mission has always been to “empower and equip advisors to ensure they have a meaningful impact in the lives of their clients.” This is now more important than ever. The recent market environment has clients on edge, and they need more guidance than ever before. While many want investment perspectives, this webinar will identify 3 core questions that can help you immediately engage clients and prospects in a more meaningful way. And, as you address these three simple questions with your clients, they will help ensure you not only retain the relationship, but also help you make the case to consolidate assets with you going forward.

The discussion will explore:

- How bear markets cause a significant change in client relationships
- Two approaches to communicating with clients and the one that is more meaningful
- Engaging clients with three simple questions
- Leveraging “Rapid Planning” to help clients gain clarity and solve for the three questions
- Keys to translating the current market environment into opportunity

If interested in this free webinar, please contact Rick Swygman at (404) 324-4600 or rickswygman@greeneconsults.com.