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How to Give Financial Advice to Women: Attracting and Retaining High-Net Worth Female Clients (General Finance Investing)

Kathleen Burns Kingsbury

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Female Clients (General Finance Investing):

2 of 2 people found the following review helpful. Outstanding resource for financially advising women By Denise P. Federer, Ph.D. I highly recommend this book to professionals who want to increase their knowledge and skills when advising women. Kathleen has done a stellar job providing an overview of the female perspective towards money. As importantly she presents excellent practical strategies for financial advisors to work more effectively with their female clients. Denise P. Federer, Ph.D. Federer Performance Management Group, LLC 2 of 2 people found the following review helpful. Accountants, Bankers, Attorneys Financial Advisors - this book is for you! By J.W. I highly recommend that accountants, lawyers, bankers, investment advisors and financial planners buy this book. Ms. Kingsbury's insights are invaluable to communicating effectively with female clients. And if you are a female client, give the book to your advisors so they will treat you how you want to be treated! I gave copies to my investment and financial planning advisors and they were thrilled that I did. 1 of 1 people found the following review helpful. Excellent Resource By THOUGHTFUL This is an excellent resource for all those who advise clients on financial and estate planning matters. Ms. Kingsbury has done a very thorough and insightful job. She hits hard and directly the obstacles many advisors face and do not even know it. Her writing is clear, direct and useful. I highly recommend this book.

YOUR ONE-STOP HANDBOOK FOR CONNECTING WITH AFFLUENT FEMALE INVESTORS There is audio or video content present in this Kindle file or a web site referred to by it that cannot be played on Kindle e-ink devices. "How to Give Financial Advice to Women is full of specific and useful suggestions to help financial advisors serve female clients more effectively. A great addition to any financial planner's professional bookshelf." -- Rick Kahler, CFP, coauthor of *Conscious Finance* and *The Financial Wisdom of Ebenezer Scrooge* "Finally a comprehensive answer to Freud's famous question, 'What do women really want?'--at least when it comes to financial advice. . . . A must-read manual for financial advisors on how to work authentically and appreciatively with women." -- Eleanor Blayne, CFP, President, *Directions for Women*, CFP Board Consumer Advocate "How to Give Financial Advice to Women arrives perfectly timed for advisors seeking guidance with the changing landscape of modern financial management. Addressing the dramatic rise of women in business, investing, and wealth, Kathleen Kingsbury clearly articulates how advisors can and need to understand the perspectives of female clients. Every advisor should read this book and learn these skills." -- Jim Grubman, PhD, *FamilyWealth Consulting* About the Book: During the next several decades, women will inherit approximately \$28.7 trillion in assets and will need good financial guidance to manage their increasing wealth. The problem is that two-thirds of women don't trust financial advisors. Even if you are the best at what you do, a female client will pass you over if you can't effectively communicate and establish a trusting relationship with her. *How to Give Financial Advice to Women* is your one-stop handbook for connecting with affluent female investors. Written by a wealth psychology expert with over 20 years of experience coaching women, this practical book helps you understand the wants and needs of affluent female clients and shows you how to appeal to this group of loyal investors. First, it breaks down the psychological fundamentals of women and wealth, and then it outlines the skill set you need to effectively communicate and advise affluent women. With the help of concrete action steps, in no time at all you will: Refine your advising style to appeal to women Be sensitive to the realities of affluent women's lives Meet the unique needs of women in a variety of life transitions Connect with women both as individuals and as part of couples Build trust, actively listen, and foster financial confidence Help women prepare their children to receive wealth Whether you are a male or female advisor, *How to Give Financial Advice to Women* shows you how the industry has historically made women feel misunderstood and undervalued and gives you everything you need to buck the trend and capitalize on being female friendly. This complete guide even comes with valuable marketing dos and don'ts to ensure you attract the right clients in the most cost-effective way. *How to Give Financial Advice to Women* tells you what every wealthy woman wants her financial advisor to know.

From the Back Cover During the next several decades, women will inherit approximately \$28.7 trillion in assets and will need good financial guidance to manage their increasing wealth. The problem is that two-thirds of women don't trust financial advisors. Even if you are the best at what you do, a female client will pass you over if you can't effectively communicate and establish a trusting relationship with her. "*How to Give Financial Advice to Women*" is your one-stop handbook for connecting with affluent female investors. Written by a wealth psychology expert with over 20 years of experience coaching women, this practical book helps you understand the wants and needs of affluent female clients and shows you how to appeal to this group of loyal investors. First, it breaks down the psychological fundamentals of women and wealth, and then it outlines the skill set you need to effectively communicate and advise affluent women. With the help of concrete action steps, in no time at all you will: Refine your advising style to appeal to women Be sensitive to the realities of affluent women's lives Meet the unique needs of women in a variety of life transitions Connect with women both as individuals and as part of couples Build trust, actively listen, and foster financial confidence Help women prepare their children to receive wealth Whether you are a male or female advisor, "*How to Give Financial Advice to Women*" shows you how the industry has historically made women feel

misunderstood and undervalued and gives you everything you need to buck the trend and capitalize on being female friendly. This complete guide even comes with valuable marketing dos and don'ts to ensure you attract the right clients in the most cost-effective way. "How to Give Financial Advice to Women" tells you what every wealthy woman wants her financial advisor to know. About the Author Kathleen Burns Kingsbury is the founder of KBK Wealth Connection and a wealth psychology expert and behavioral change specialist. She teaches financial services professionals how to connect, communicate, and collaborate more effectively with their clients to increase client retention and improve profitability.