



# HOW TO LAND HIGH-NET-WORTH CLIENTS

Guide to Attract, Engage, and Land  
High-Net-Worth Clients



The younger generation of high-net-worth clients are transforming the wealth sector as global wealth management becomes more popular. The transformation also creates the need for advisors to evolve in order to create a new relationship, as well as the need for high-net-worth families to discuss net worth.

This guide will cover the key strategies that can be used to substantially attract affluent clients, win their trust, retain them and their upcoming generations.

If you want to enjoy the status of the crème de la crème in financial advising, then it is time to live by this stone tablet!



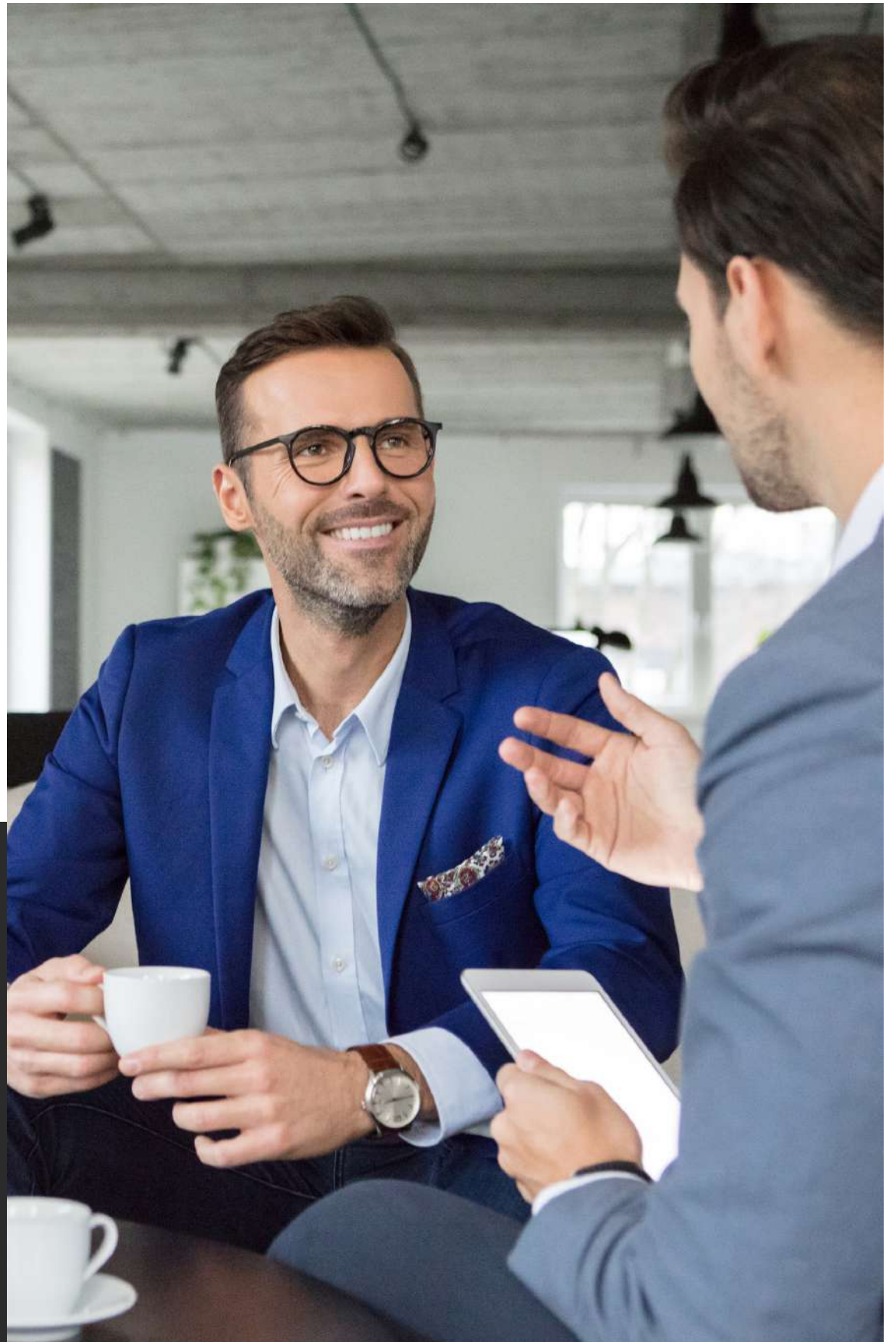
## Improve service quality

HNWIs bring in a lot of business. The stature of their wealth demands more attention, personal communication, and seamless service.

As a financial advisor, if you are looking to get more HNWIs, then your goal should be to provide them with comprehensive and customized investment plans.

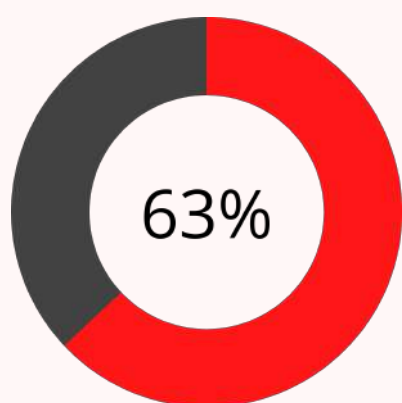
### Don't believe us?

According to **CapGemini's 2019 Wealth Report**, firms that ranked higher in personal connection outperformed ones that ranked lower in several financial parameters.

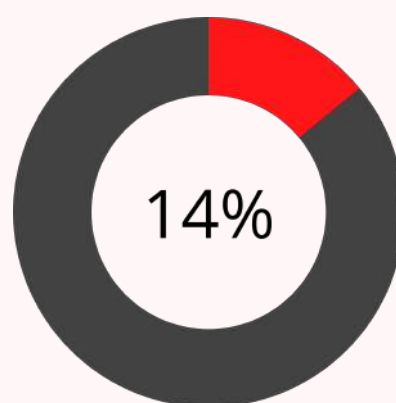


## Focus on high density segment

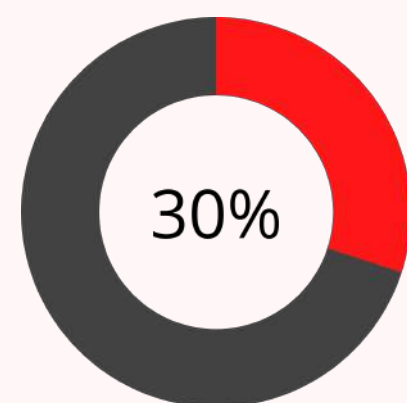
Spectrem Group research has concluded that:



**HNWIs are retired**



**Consider themselves  
semi-retired**

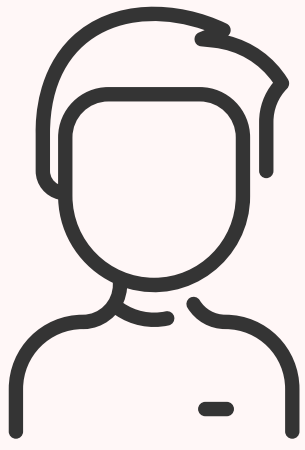


**Invest only during an  
event**

This means that a majority of them are looking for estate planning, customized wealth management solutions, and philanthropy options.

Make sure these areas are your strengths when it comes to giving them advice.

## Develop the right personality

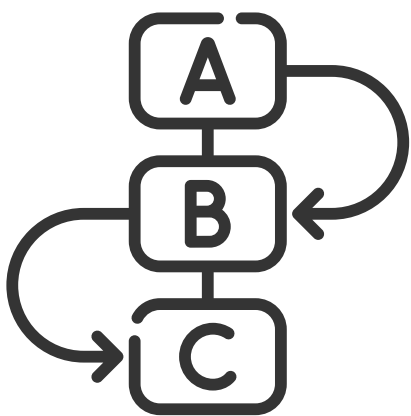


Every HNWI is looking for a specific set of personal qualities from their financial advisor.

To break into their circles, you need to cultivate a personality that allows them to trust your advice on their money.

**From being proactive to dealing in absolute discretion and being responsive and reliable, your attitude should put them at ease and make them believe that you are the right person for the job.**

## Prioritize getting things done



Your HNWIs do not have the time or intention to worry about their financial hurdles. And since they have money, their problems are more complicated than the average Joe.

**As their advisor, your only work is to become a one-stop solution to getting these problems fixed efficiently. The less your client has to worry about the money they trust on you, the larger share of their pie you are likely to get.**

## Network with other industries



How does a financial advisor get more HNW clients?

**Start interacting with other industry professionals who also have similar client profiles, like lawyers, real estate firms, accountants, and personal shoppers. If you can score an introduction with a client from someone they already know, your trustworthiness improves immediately!**

Also, service your existing HNW clients in a way that they recommend other people from their social circles. If you get these two channels on lock, adding more HNW clients will be a cakewalk.

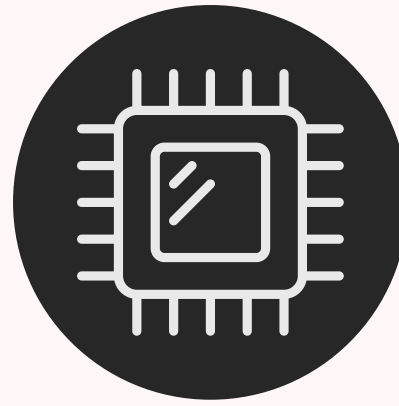


## Offer investment diversity

If you have more than a million dollars in investible liquid assets, then you will need a portfolio that looks further than the horizon.

**Financial advisors to HNWIs need to have a diverse set of options that include everything from art to BigTech options, gold bullion, or prime real estate.**

Not just that, they also need to focus on maximum tax efficiency and high returns so that their clients never regret trusting them in the first place.



## Plan strategy and execution

**When you are faced with a complex situation, what do you do as a financial advisor?**

It's not enough to solve the problem. You must make sure that your client is a 100% with your strategy and execution. As a consultant, it is important that you give them sound advice but never make them feel like you are the one in charge.

**Every HNWl needs to have control over his investible assets at any given time.**





## Ensure their family legacy

People who have been able to achieve financial success in their lives obviously look to pass it on to future generations.

**Your job as their financial advisor is to make sure that this is planned seamlessly. Crafting a comprehensive inheritance plan that focuses on maximizing resources for future generations and growing their wealth over time should be top priority.**

Letting your clients exercise complete control in this planning and execution is key to making them happy.



## Always manage risks

Each of your HNW clients will have different mentalities.

Some of them are looking for specific returns and have no intention to take very high risks. Others are more intent on growing their wealth rapidly and have no impediments in pursuing high risk investments.

**Every advisor should identify the ROI that each client expects from their investment and pursue risks accordingly.** Of course, every now and then you need to tell them about new promising opportunities that may add more diversity to their portfolio. But it is important that you set plans according to the goals that they want to achieve.



## Educate your clients

If you are working on inter-generational transfer of properties, then you need to be the one educating and explaining your clients and their heirs as to how everything is going to pan out.

These processes are complicated by formalities and need to be guided through to execute seamlessly.

**Starting the education of the heirs at an early age and teaching them how to manage and grow their wealthy estates is your key duty as their trusted financial consultant.**



These are the **10 commandments** that every financial advisor should live by when trying to acquire and retain their high-net-worth clients.

Are you ready to manage the wealth of high-net-worth client with strategic portfolios?

At CAN, our objective is to empower wealth managers and help them to position themselves in the rapid going wealth industry.

Join CAN today and get a chance to network with our 200+ associates from all around the world.





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