



## ► Narrow Your Focus

Step  
1.

### **Define Your Niche** ("Women" is too broad):

Focus on a specific segment of female clients, such as women in transition (widowed, divorced), professional women, or female business owners.

### **Create Pain-Point Driven Client**

**Personas:** Develop a detailed profile of your ideal client, considering her interests, needs, preferences, profession, life stage, and values. But don't forget her pain points—this is the most important bit of intel you can have. Understanding your ideal client's problems and how you help address them makes it easier to tailor your marketing to attract similar clients.



## ► Segment Your Audience

Step  
2.

### **Laser Focus Your Marketing Efforts:**

By segmenting your audience, you can craft relevant and personalized content that speaks directly to their needs and concerns, helping ensure attention-grabbing marketing materials, emails, and event promotions.

### **Write Website Content That**

**Pre-Sells:** Develop a content strategy that demonstrates your expertise and addresses each target audience's specific pain points. Make sure to structure your website to guide different client types to relevant information effortlessly. By designing an engaging website experience, you can build trust and demonstrate your value to prospects before they contact you.



## ► Connect + Collaborate

Step  
3.

### **Create Alliances with Women**

**Professionals:** Network with female professionals and establish partnerships, as 70% of women refer friends and relatives to trusted advisors.<sup>1</sup>

**Engage with Nonprofits:** Get involved with organizations that serve and empower women by sponsoring events, sitting on nonprofit boards, or supporting causes women care about.



## ► Foster Community + Engagement

Step  
4.

**Host Women-Only Events:** Organize women-only events tailored to a stage of life, such as empty nesters. Host family-oriented activities, such as a trip to a pumpkin patch with female clients and their children and/or grandchildren. Or facilitate women-only investor groups for education and a sense of community and belonging.

### **Facilitate Meaningful Money Conversations:**

Encourage women to explore their "money story" and discuss how it impacts their lives, helping them connect financial planning with personal meaning. Money stories can be uncovered through questions like: What were your childhood experiences with money? What's your earliest money memory? What money lessons did your mother or father teach you? Examining money stories can help clients make more conscious and empowered financial decisions while helping them avoid biases and stay committed to their plans.



## ► Empower Through Education

Step  
5.

**Offer Informational Programs:** Provide workshops focused on financial literacy and empowerment to help women gain confidence in managing their finances.

**Anticipate Common Questions:** Be prepared to address common concerns, such as "Am I going to be okay?" with empathy and clear, actionable advice. Anticipate questions like this and address them before they're even asked.



**WIN  
HER  
TRUST**

Strategic Blueprint for Financial Professionals  
**How to Attract + Retain  
Female Clients**



## ► Build Authenticity + Trust

Step

6.

### Put Your Values Front and Center:

Clearly communicate your values on your website and in client interactions. Then demonstrate those values. For example, you could recognize client milestones or offer services like multigenerational financial literacy programs or grief counseling to widowed women.

### Develop a Compelling Value Proposition:

Clearly articulate why women would want to work with you, emphasizing your understanding of their unique financial challenges and your commitment to empowering them. A simple formula for developing your value proposition is: "We help (X) do (Y) by doing (Z)."



Step

7.

## ► Foster Inclusivity + Empowerment

### Showcase Diversity:

Highlight client and team member diversity, so women from various backgrounds see themselves authentically represented and valued.

### Offer Mentorship Programs or Networking Events:

Connect women with leaders and role models to foster professional growth and collaboration.



Step

8.

## ► Support + Celebrate

### Support Women's Causes:

Align your brand with social causes that empower women, such as Dress for Success, as it demonstrates a commitment to making a positive impact on women's lives.

### Celebrate Success Stories:

Get permission and compliance approval to share success stories of female clients' experience with you. This can inspire prospects and existing clients, enhance credibility, and boost referral potential.



Step

9.

## ► Communicate Often + Effectively

### Write a Short Email Newsletter:

Share personal stories that allow clients to connect with you on a deeper level, timely financial or retirement planning news, and insights into financial planning areas relevant to women to highlight your ongoing commitment to their financial well-being.

### Engage on Social Media:

Ask your female clients to connect on social media platforms they are most comfortable with. Use social platforms to share valuable content, initiate conversations, and build relationships with your audience.



Step

10.

## ► Continuously Adapt

### Gather Feedback:

Regularly solicit feedback from female clients to understand their evolving needs and preferences. Ask questions such as, "Have my communications help empower you financially?" and "What more would you like to gain from our interactions?" and "What else would you like me to know?"

### Adapt Your Strategies:

Use insights from client feedback to refine your services and marketing strategies, helping ensure you continue to meet the needs of your female clientele effectively.

[www.ml.com/women-research.html](http://www.ml.com/women-research.html)

Learn about how you can attract and retain female clients by addressing their unique financial needs. Contact the sales desk at **833-465-0818**.

