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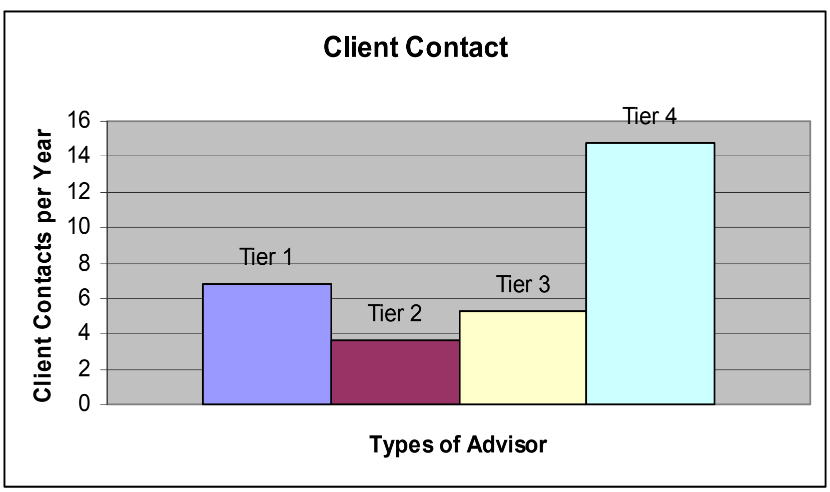
Research Shows Frequent Client Contact Pays Big Dividends

CEG Worldwide's study of advisors finds those who reach out earn more money from fewer clients.

SAN MARTIN, CA—January 6, 2009—A recent study conducted by CEG Worldwide reveals that the most successful financial advisors contact their top clients more than four times as often as the least successful advisors. They earn more money even though they work with fewer clients.



Source: CEG Worldwide, Best Practices of Elite Advisors, 2008.
n = 2,094 advisors.

Tier 1
Income less than $300,000
150 or fewer clients

Tier 2—*least successful*
Income less than $300,000
More than 150 clients

Tier 3
Income more than $300,000
More than 150 clients

Tier 4—*most successful*
Income more than $300,000
150 or fewer clients

As you can see, the highest tier of advisors—those who earn the *most* income from the *fewest* clients—are the ones who contact their clients most frequently: 14.8 contacts per year. Conversely, the Tier 2 clients, who make the least income from the most clients, contact their clients only 3.6 times per year.

"When the markets swoop and dive, don't bury your head in the sand or hide from your clients in fear that they'll be angry about their account statements," advises Jonathan Powell, senior managing principal at CEG Worldwide. "The best advisors do just the opposite. They proactively call their clients and check in because they understand that reaching out to clients and communicating with them during periods of intense market volatility is one of the best ways to separate yourself from your competition and gain the loyalty of your clients."

About CEG Worldwide, LLC

CEG Worldwide is passionate about coaching financial advisors and institutions to Build a Simple and Elegant Wealth Management Business℠. Using state-of-the-art research methodologies and analysis combined with proven strategies and tactics for building highly successful advisory practices, CEG Worldwide provides uniquely powerful insight into what allows elite financial advisors to thrive.

CEG Worldwide delivers fully scalable financial advisor training programs at many of the world's largest financial institutions. The firm's proprietary institutional strength intelligence is based upon empirical studies of more than 10,000 advisors and 14,000 high-net-worth individuals. By combining research expertise with pragmatic and proven business experience, CEG Worldwide helps institutions achieve measurable gains in productivity, retention and assets under management and provides advisors with proven business-building strategies and tactics.