Social Media & The Financial Services Industry

Using Social Media to Grow Your Business & Build Stronger, Deeper Relationships

Laura Virili

$5,000 to $10,000

Moving the Client Acquisition Needle & Sealing the Deal

Laura is a leading social media influencer, private coach, and featured speaker. Having been in the financial services industry for more than 20 years working with advisors in a variety of roles, she has a one-of-a-kind talent for understanding the needs, as well as the legal/regulatory limitations, of financial advisors and other professionals attempting to leverage LinkedIn and other platforms. She enables them to fully leverage their power and potential through easy to implement Social Media building blocks and a phased approach of increasing sophistication. Her presentation provides Financial Advisors an actionable approach for getting in front of today's prospects.

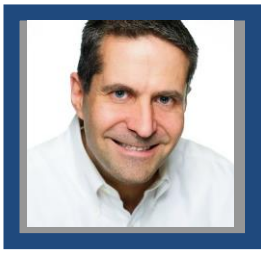
In Client Acquisition Thru Social Selling, Laura shares what it takes to acquire new clients thru social selling. She provides a roadmap that shows advisors how to create all the right connections, break the ice, build rapport in an authentic and sincere manner, take the conversation offline and convert prospects into clients. She begins by identifying the key elements that are required for an online brand, identifying high quality prospects, deepening client relationships, and then building the bridge to the next generation in a sophisticated way through social listening, social triggers, time blocking and routines

Video: Brand You – If You're Not Social You're Not Relevant

Sam Richter

$10,000 to $15,000

Teaching You New Ways to Build Powerful Meaningful Business Relationships



Sam Richter is one of the world's foremost Sales Intelligence thought leaders and considered the "Modern Day Dale Carnegie." He is most known for his innovative and breakthrough uses of social media including LinkedIn, Twitter, and Facebook, combined with web-based resources such as search engines like Google to gather valuable intelligence and develop reputation management tools.

When you Know More! about prospects and clients you ensure relevancy with every sales call, every meeting, every time. With relevancy, you connect on a personal level, make the other person feel important, and achieve "permission" to ask meaningful, value-based questions. Most important, when you Know More! and show that you can solve real problems, you win and keep more business.

In His Know More! Relationships presentation you will know more than you ever thought you could about your prospects, clients, and competition. You will learn to find qualified leads, create lists, uncover opportunities, and understand decision-makers. You will get tips and tricks to learn what is important to your prospects and clients on a personal level to help you close MORE business MORE quickly. And most importantly you will learn how to use information with any prospect to build deeper relationships with any client and completely differentiate yourself from your competition.

Video: Know More!

Maribeth Kuzmeski

$5,000 to $10,000

Helping Financial Professionals Build Relationships and Win Clients for Life

Her first financial advisor client grew from $10 million to $200 million in client assets in under 5 years. Today her firm, Red Zone Marketing, consults with top advisors and agents and she speaks about what is really working today to acquire new clients.

Maribeth is listed among the Top 25 C-Suite Speakers as seen in Meetings & Conventions Magazine and has spoken at all of Barron's Top Producer conferences, MDRT, and in front of audiences filled with hundreds to thousands of professionals sharing immediate strategies for acquiring new business.

In her presentation The Real Deal with Social Media, Maribeth shares social media & new media marketing strategies to profitably grow your business. She will teach you how to gain leads, convert current referrals with increased speed and effectiveness, and use social media to strengthen and expose your brand within your target market. Learn what is really working for advisors given compliance regulations and walk away with simple ideas for using social media in your financial services practice.

Video: Are People "Googling" You?

Kevin Knebl

$10,000 to $15,000

The New Rules for Finding Customers, Building Relationships, and Closing More Sales

Kevin Knebl can help your company, association or organization significantly leverage social media for increased lead generation, business development, sales, recruiting and consistent marketing and public relations purposes. The majority of his clients are in the financial services industry.

Kevin is the coauthor of "The Social Media Sales Revolution: The New Rules for Finding Customers, Building Relationships, and Closing More Sales Through Online Networking" Kevin's background includes being the top salesperson for four different companies including being the top salesperson in the world for an international consulting company with over 300 salespeople in 15 countries.

His core presentation Social Selling for Huge Sales Success, enables attendees to understand the relevance of Social Media in sales from a lead generation, brand management, visibility, client acquisition referral creation, strategic alliance and revenue growth perspective. Case studies are delivered which provide quantifiable results in this constantly evolving medium. Kevin covers this topic from the 10,000 feet level all the way down to the step-by-step, depending on audience and need.

Video: How Kevin Adds Value to Your Business

Kevin Nichols

$5,000 to $10,000

The Oechsli Institute: Would You Like to Acquire More Affluent Clients With the Help of LinkedIn?

When used properly, LinkedIn is a tool that has enabled a small cadre of financial advisors, to make social selling a core part of your business development efforts.

Kevin Nichols is the Director of Coaching and Social Media at the Oechsli Institute and the author of The Indispensable LinkedIn Sales Guide for Financial Advisors. Kevin coaches advisors and teams on social media usage, writes The Social Media Advisor blog and a bi-weekly eNewsletter for WealthManagement.com. He is also the creator of Social Media Prospecting Guide for advisors.

By combining The Oechsli Institute's research on affluent investors with emerging technologies you will learn how to acquire more affluent clients and use technology to your advantage. This is one of the only presentations that will show you specific tactics on how to leverage social networks like LinkedIn to actually bring in business! You will learn how to hand-select your prospects like never before by identifying your contact's connections. Gather personal and professional information on clients and prospects in advance of face-to-face meetings. Develop a profile that mirrors your real-world brand and resonates with affluent investors Build deeper, more meaningful relationships with your clients, prospects, COIs and referral sources.

Video: Financial Advisor Social Media Training