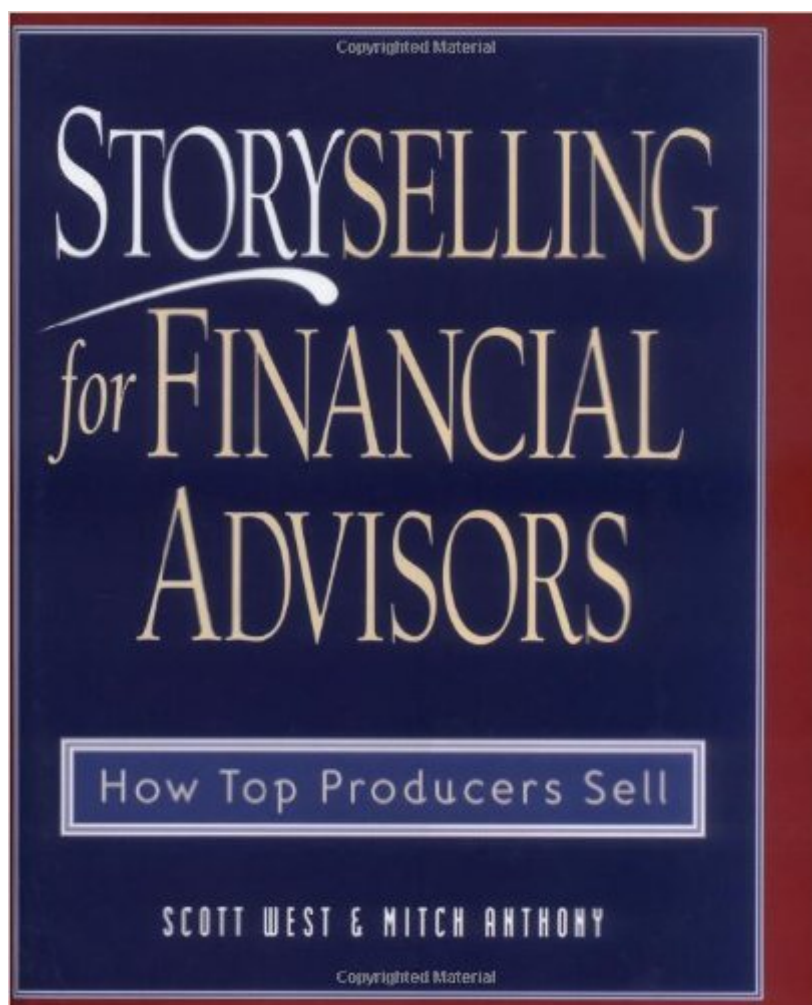


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# Storyselling For Financial Advisors : How Top Producers Sell



## Synopsis

Learn what makes a client trust you to be their financial advisor. Put the power of story telling into selling financial products. The authors explain the process of making these intuitive connections, then translate their findings into understandable and practical strategies that any financial professional can use. They present actual stories, including many by Warren Buffet, one of the greatest "storytellers" of all time. These actual stories can help financial pros tap into the "gut reaction" of different types of clients. The book also includes special topics on communicating to women, the 50+ market, and the affluent.

## Book Information

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## Customer Reviews

This is an excellent book. Numbers and statistics put clients to sleep. But describing a financial concept by telling a story engages the client(s). I am a Financial Advisor, and when people ask me what I do as a Financial Advisor, I tell them a story. Sometimes I go with this (this is not in the book): "The average American spends a dollar the following way: They spend \$0.62 on standard of living, \$0.25 on taxes, \$0.10 on insurance, and \$0.03 or less on savings. I find ways to reduce your tax liability, try to reduce your insurance while maintaining proper and adequate coverage, and see if we can cut some spending on standard of living." You would be surprised to see how clients listen to that versus a complex explanation of what a Financial Advisor does - because they can relate to a dollar and how it is spent. If you want to keep trying to impress clients with how smart you are by using industry jargon, statistics, and other numbers - keep doing it; it may be one more client for me to hook. Buy this book.

This book explains why some very smart people fail to achieve their potential in this fascinating and competitive industry: They do not connect with their clients at the level where decisions are made. Smart investment professionals who truly want to succeed need to integrate every idea and technique it contains so they can help their clients overcome their fears of investing and move confidently toward their financial goals. As a certified financial planner, president of a securities firm, and industry veteran of fifteen years, I immediately recognized the tremendous value of this book. I ordered Storyselling for every investment representative in our company and for each executive in our financial services group.

Uncommon common sense in approaching potential clients and establishing the vital basis of trust to move an initial meeting into a meaningful, long-term relationship beneficial to both parties. West & Anthony capture the very essence of building on the fundamentals of a value-added client experience, focusing on the essential concept of building the one-on-one rapport that establishes an advisor as the advisor of choice (and sets the stage ultimately for quality referrals.) I especially enjoyed reading Chapter 13 "Let Me Tell You a Story" focusing on analogies and metaphors--fantastic! A good read and an excellent philosophy to establishing a financial advisory practice. 4 Stars.

This is an absolute must read for financial professionals. This book has helped me to greatly improved my practice. I now use anecdotes, stories, and analogies rather than ledgers and charts. Your clients will love your new, easy to understand approach.

Financial advisors, treat yourselves to this book! And buy a copy to give a colleague new to our profession! The message of this excellent book is this: "Sell what clients understand and relate to: concepts and benefits, not facts and figures. For by explaining concepts and benefits, they will understand and will in turn trust you." Story telling is one of the oldest and THE most effective way of educating and passing on information. I have been a financial advisor for 26 years and I profited greatly by reading this interesting and well written book. I wish I could have read it many years ago. **HIGHLY RECOMMENDED!**

I was really disappointed with this book. I was looking for a book that would help me structure my presentation and give me a pool of metaphors and analogies that I could use to help clients

understanding. Whilst the end of the book contains maybe 25 metaphor presentations on various topics (diversification, why use an adviser, bear markets etc.) the rest of the book is pretty much filler. Quotes take up half of nearly every page. There are chapters that discuss presenting to the 65+ market and to women that contain very little useful information. There's a frustrating section discussing the "science" behind storyselling. [This book isn't worth \$5, let alone the \$30 it retails for.]

In an increasingly crowded and competitive marketplace for individual financial services, the key to success lies in making that special connection with the customer. Financial planning too often gets bogged down in quantitative overanalysis: Alphas, Betas, Sharpes, Distribution Analysis, Volatility, etc. While these measures are all important in portfolio management and security selection, the key to winning the trust of the investing public is qualitative and personal. People choose a financial professional based on trust and the assurance that they speak the same financial language. StorySelling addresses this key issue of relating to the customer. The best way to communicate complicated quantitative information is through the use of stories: real-life examples, metaphors, and allegories of decision-making on a human, personal, emotional level. Ultimately, all financial decisions and the forging of professional relationships in the financial services arena are emotional ones. Story Selling illustrates for us how to connect with customers on the emotional plane through stories. Bravo !

Almost every financial advisor will find this useful. Authors Scott West and Mitch Anthony summarize many important facts of life in sales, and they do so in a concise, highly readable style that is free of jargon. They counsel financial advisors to communicate with clients in easily understandable language, using self-deprecating wit, stories and vivid metaphors. They rightly remind readers that people make decisions about advisors based on what they feel more than on the quality of the advisors' charts and graphs. Then, they discuss different potential clients and show advisors how to appeal to the most critical, most rapidly expanding target markets. We highly recommend this specific, focused sales guide to financial advisors.

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