

## HOW FEMALE FRIENDLY IS YOUR PRACTICE?

### *How you interact with women in general*

1. When you meet with a (any) woman do you focus only on what she says (answer yes) or do you multi-task (answer phone/check email/let someone interrupt/excuse yourself) (answer No)?  
 Yes  No
2. Have you ever attended the funeral of a client?  Yes  No
3. Have you ever visited your client at their home because it was more convenient for them?  
 Yes  No
4. Have you ever referred someone to a female client without expecting anything in return?  
 Yes  No
5. Have you ever had to call a female client to ask her if anything was wrong with her husband (e.g. dementia)?  Yes  No
6. Have you ever invited a female client who is an executive or professional to speak at a function you were involved with?  Yes  No
7. Have you ever helped a client get a lawn service provider or mechanic or doctor (or any non-financial referral)?  Yes  No
8. Have you ever done a personal favor for a client that is non-financial related (e.g. written a note of encouragement to a son/daughter of a client when you heard they had lost their job?)  Yes  No

### *How women interact with you*

9. Do you get a holiday/birthday card from any of your female clients?  Yes  No
10. Have any of your female clients given you a referral to a new client in the last 12 months?  
 Yes  No
11. Has a client ever attended the funeral for someone close to you to show their support?  Yes  No
12. Do your clients call you to let you know they are selling their home?  Yes  No
13. Do your female clients know as much about you as you know about them?  Yes  No
14. Has a female client ever told you something that counters what her husband told you?  Yes  No

### *How you manage your practice*

15. Do you have a pleasant entrance to your practice where clients can be comfortable?  Yes  No
16. Do your clients ask more questions of you than they do of your sales assistant?  Yes  No
17. When meeting with a female client do you look at her more than at your laptop or note book while taking notes?  Yes  No
18. Have you ever held an event that wasn't about investing?  Yes  No
19. Have you held a client event where more women than men attended?  Yes  No
20. Did female clients bring a friend to your event?  Yes  No
21. Do your single female clients ask you for a lower price on their account?  Yes  No

22. Do you know the exact number of female clients you have (even those in couples)?  Yes  No
23. Do you know how much in assets your female clients represent?  Yes  No
24. Do you know the status of your female clients: single by choice, widowed, divorced  Yes  No
25. Do you serve women the way they ask you to rather than the way you serve your male clients?  
 Yes  No

### *How you engage women in financial matters*

26. Have you ever said “let me explain how we’ll do that” to a female client?  Yes  No
27. Have you ever advised a client how to make up income lost through maternity leave?  Yes  No
28. Is the retirement plan you created for a couple based on the woman’s needs not her husband’s?  
 Yes  No
29. Has a female client told you she doesn’t understand investing very well?  Yes  No
30. Did you offer to help her understand by spending time directly with her?  Yes  No
31. Have you ever used a term that a female client asked you to explain?  Yes  No
32. Have you discussed spending as part of your role as a financial advisor?  Yes  No

### *Check your Score*

*Count how many yes’s you have to see how female friendly your practice is but remember, regardless of your score, there is always room for improvement. Women make excellent clients and learning how to connect with them is certainly worth the effort.*

**24-32** Congratulations! You are a superstar!

**15-23** Not bad! You are doing a pretty good job but there is some room for improvement.

**10-14** Uh! Oh! You got a few things going for you but certainly could use some help.

**0-9** Yikes! You need lots of help if you want to run a female friendly practice.

**StrategyMarketing.ca offers the following courses (see [www.strategymarketing.ca](http://www.strategymarketing.ca)):**

- Retaining Female Clients (includes a proprietary risk calculator)
- The Art of Acquiring Female Clients
- How Women Make Financial Decisions
- How to Evaluate the Risk of Female Clients Leaving You
- Four Steps to Succeeding with Female Clients