

# StrategyMarketing.ca

## Backgrounder

According to the Globe and Mail, women control one-third of all financial assets in North America, which translates to an estimated \$3.2 trillion in total assets and \$1.1 trillion in financial wealth alone when applied to Canada.

The financial industry is taking notice of their growing importance but many companies still struggle to understand why their existing service model fails to resonate with these women.

*Strategy Marketing* was created in response to the gap between what the financial industry offers and the expectations of women they seek to attract and retain.

The company is a the brain-child of its partners Judy Paradi and Paulette Filion, who work with financial companies about how to respond to the growing economic force represented by women and how to meet the needs of female clients through their front-line staff and, in particular, their financial advisors.

Our focus is helping the financial community understand the perspective of the female client and engage women on their terms in order to retain the assets they control.

Our first White Paper, ***Why women leave their financial advisors: and how to prevent it***, discussed the disconnect that exists between how women are treated by their advisors and their expectations, and what advisors can do to meet the challenge.