

Seize the moment

5 strategies to engage and support female clients

Issued by North American Company for Life and Health Insurance[®]

Help improve client retention and expand market share in this rapidly growing segment.



Embrace empathy and relationship building

80% of widows leave their financial advisor within a year of their husband's death.¹ Building strong relationships over time, through empathy, personalized communication, and regular touchpoints, can help retain these clients when they may need additional support.



Tailor financial education

Women aged 45-64 are 87% more likely than men to be uncertain about how much money they'll need in retirement.² Consider offering tailored workshops and educational opportunities for women in this age group to give them a better understanding of their potential retirement needs and the financial options available to them.



Be “all-in” with your communities

Word-of-mouth referrals are powerful, so make sure people know who you are and the services you provide. Almost a third of all survey respondents said they would rely on a professional recommendation (from their banker, accountant, etc.) to find an advisor.



Celebrate milestones and achievements

Use special event milestones – personal and financial – as an opportunity to connect with clients and show you care. Personal milestones include birthdays, achievements within the family such as a graduation, marriage anniversaries, or even grief-related anniversaries. Take note of work anniversaries or if they change jobs or careers. Financial milestones, such as hitting the Required Minimum Distribution (RMD) age, retiring, or even the anniversary of your professional relationship, are also important opportunities to remind them of your value.



Take advantage of online networking

An online presence is particularly important for attracting younger clients aged 18-45, who are much more likely to use general online search and online reviews to find a financial advisor. Consider meeting clients where they're at, by establishing your website, learning about search engine optimization, engaging on social media, hosting a podcast, or creating your own videos to share via email or social media.



Learn more about our Empower
Educational Framework.

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1. Source: Blackrock, 2025, blackrock.com/us/financial-professionals/insights/financial-advisors-and-women-investors-as-heirs-of-generational-wealth

2. Source: Sammons Financial[®] Group Women and Wealth 2024 Study

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