

Flip the script on dinner seminars

“Experiences” may be a smarter way to engage women.

If you're hoping to build and strengthen relationships with women clients, a standard financial presentation format may not be your best tool. Instead, consider an approach that fosters the 'Three C's': *connection, conversation, and confidence*.

CONNECTION

Design it to “bring a friend”

Women are more likely to attend - and engage - when they come with someone they trust. It encourages attendance, creates a more comfortable environment, and expands your reach organically.

Curate comfort

- Create a relaxed, judgment-free environment
- Add a social element (coffee, wine, activity)
- Keep the group smaller to allow for more fruitful conversation

CONVERSATION

Start with a simple shift

Instead of leading with a presentation, open up a conversation. Instead of leading with a product or service, start by guiding your audience through why preparation matters.

Content matters

Focus on real-life topics that affect women such as income disruption, longevity risk, long-term care needs, and leaving a legacy.

CONFIDENCE

Rethink the venue

The venue sets the tone before you say a word. Choosing spaces that feel natural, social, and inviting can replace natural hesitation with openness and confidence.

Consider options like:

- Wine night at a locally owned art studio, winery, or bookstore
- Boutique or dress shop event (utilize seasonal tie-ins like prom, holidays)
- Spa or wellness space (makes for a great self-care theme)
- Self-defense or safety course (tie this back to preparation or protection)

Crafting experiences that allow for connection, conversation, and confidence will help you build and strengthen relationships with women.

Your North American regional team can offer tips, materials, and support when you need it.



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