

**Title: The Art of New Client Attraction Video**  
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David Richman: Our industry has historically struggled with what we metaphorically consider to be the tension between a dock and a boat. The dock represents the old school sales model of client acquisition. What's the dock? The dock is beckoning advisors to go sell something, close some business, build your book. The boat, on the other hand, beckons advisors to be professionals, to be confidants to their clients. The boat's been trying to leave the dock for years.

Do you really acquire new clients? Unless your business model includes buying up other advisory practices, the answer is no. You either attract people to work with you or you do not.

We believe there is a fine art to client attraction. It takes a certain mindset and a degree of artistry in at least four dimensions of conversation. First, make first encounters count. How can you set the stage for a natural follow-up conversation? Second, generate more meetings. How skillful are you with follow-up? Third, run better first meetings. Can you avoid the mushy pipeline syndrome? A devastating disease. And fourth, capture referable moments. Can you get referrals without having to ask for them?

Reflect on your conversations. Are your feet squarely in the boat, leaving the dock behind?

The Advisor Institute is committed to helping you deepen client connectivity and grow your business without ever being perceived as a salesperson.

- End of Recording -

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