

SUMMARY OF SERVICES
CUSTOMIZED SPEAKING ENGAGEMENTS

A dynamic and knowledgeable speaker, Hannah draws upon proprietary research conducted with high-net-worth individuals and their advisors to craft a compelling and actionable message for her audiences.

Representative Topics

Understanding the Wealthy

- Segments include: <\$10M net worth, >\$10M net worth, Middle-Class Millionaires, the Ultra-Affluent, Business Owners, Celebrities, Professionals, Multigenerational Families

Maximizing Client Relationships

- Turning customer knowledge into business opportunities
- Creating affluent client loyalty for retention and growth

Adopting Best Practices

- The three differentiators of the most successful advisors
- Highlights from the industry's largest best practices study
- Building a family office practice

Perfecting the Referral Process

- Building strategic alliances with accountants and attorneys
- Accessing client referral networks

Format

Hannah is available for keynote addresses, lectures, small-group presentations and panel participation. All speaking engagements are fully customized for each audience.

Pricing

Appearance fees start at US\$17,500 plus first-class travel, accommodations and related expenses. Pricing may vary based on content, format, length, audience and scope of relationship. Estimates, breakpoint pricing and a client list are available upon request.