

SUMMARY OF SERVICES
CUSTOMIZED WORKSHOPS AND TRAINING PROGRAMS

Tailored and extensive access to Hannah's expertise is available in highly interactive workshops and trainings that deliver the insights and tools attendees can immediately use in their business. The small-group format allows for group discussion, guided analysis and case studies designed to stimulate ideas and action.

Sample Programs

Sourcing High-Net-Worth Clients

- Successful advisors know that centers-of-influence are one of the best ways to find affluent prospects, but the majority of practitioners are not managing these valuable relationships to their advantage. This workshop will help familiarize advisors with the systematic processes they can use to identify suitable professional partners, forge strong working relationships with them to source new business, and jointly deliver more comprehensive and specialized services to current wealthy clients.

Cultivating the Luxury Consumer

- A research-based, multi-part program designed specifically to help professionals and firms increase marketing effectiveness with high-net-worth consumers. Training modules include: The Affluent Consumer and the Luxury Lifestyle, The Purchasing Process, and Marketing to the Affluent.

Format

All workshops and training sessions are fully customized by firm and can be structured as half-, one-, two- and three-day programs.

Pricing

Program fees start at US\$30,000 plus first-class travel, accommodations and related expenses. Pricing may vary based on program topic and materials, projected distribution and use of content, attendees and scope of relationship. Consultations and proposals are available upon request.