KEYNOTE
PRESENTATION

ADVANTUS MARKETING
ADVANCING YOUR MARKETING MOMENTUM

Mastering the Art of “White Glove” Client Service

A Roadmap for Assistants and Practice Managers

Embark on a journey of delivering “White Glove” client service through this engaging workshop for financial advisors’ assistants and practice managers. This special session is tailor-made for professionals who aspire to go beyond the expected. You will take a deep dive into the strategies and skills required to provide clients with exceptional, personalized, and truly elite service experiences.

You Will Learn the Best Practices for:

1. Creating Memorable Experiences for Clients at Every Touchpoint.
2. Anticipating Client Needs and Preferences.
3. Building Lasting Rapport and Distinction for Financial Advisors.
4. Honing Your Communication Skills with Empathy and Thoughtfulness.
5. Managing Client Complaints Gracefully.
6. Elevating the Client’s Office, Phone, and Service Experience.
7. Fostering a Remark-Worthy Advisory Practice.

Set a new standard for client service in an advisory practice and master the art of “White Glove” service.

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