



**NAIFA
San Antonio**

Paying It Forward Can Pay Dividends
Alice Tang, ChFC®, MIM

Building a Network of Center of Influence

Wish your CPAs and Attorneys would send you more referrals?

Your clients **CAN** help

Building a Network of Center of Influence

Ask Your Clients

- Who is your CPA?
- How would you rate your CPA 1-10?
- Score 7 and below – Refer to my business partners
- Score 8 and above – Ask to be introduced to me


At a Client Review Meeting...
Building Your Centers of Influence List

Your Circle of Advisors				
	Name	Rate: 1-10	Reason	Connect me
CPA	Jane Account	9	Proactive	✓
Attorney	Joe Attorney	6	Only talk to his assistant & NOT him	Refer my COI
Banker	Jill Banker	8	Resourceful; getting things done	✓
Realtor	John L. Scott	6	Not getting back to us	
Mortgage Broker				
P&C Agent	ABC Insurance	5	Never heard from them in 10 years	Refer my COI
Health Care Agent				

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Networking
 "It's All About Them"

- Listen to their story
- Find something in common with them
- Uncover what they need



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Paying It Forward by GIVING
 Control What You Can Control → Giving

- Connect with COI
- Connect with them at LinkedIn
- Handwritten Thank You card or note
- Invitation to client events
- Do something special

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Creating Client Confidence
 Use Your Tools to Build a Plan

- Value of money
- eMoney or Planning Software
- Actions they can take to reach goals
- Deposit in their emotional account



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My Dream...
 Circle of Advisors Who Work Together to Support Client



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2008: Founded WIFS Portland
 WIFS Portland is THE LARGEST CHAPTER in the country

Giving ↔ **Receiving**

- **Visibility** in the financial industry & community
- **Connections** with Center of Influence (COI) – New and Existing
- Meet monthly to keep **me in front of the members (COI)**
- Refer **Business Partner to speak** at events
- National Board Membership **creates conversations**
- **Mentoring** new advisors – pay it forward

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Tips for Growing Your Business
 Advice for Networking and Generating Referrals

Focus on **your top 10 clients** and **top 5 COIs**
 In next **90 days** – **Network!**

System and Discipline
 How to Keep Track

Client & COI Touches

	Total Touches	Call / Email / Text	Fire Side Chat	Dinner / HH / Coffee	CASA Auction	Referrals Sent
Client 1	4	2		1		1
Client 2	5	2	1	1	1	
Client 3	7	5		1	1	1
Client 4	6	4		1	1	
Client 5	7	3	1	1	1	1
COI 2	4	1	1	1		2
COI 3	5	3	1	1		1
COI 4	10	4	1	1	1	2

Tips for Growing Your Business

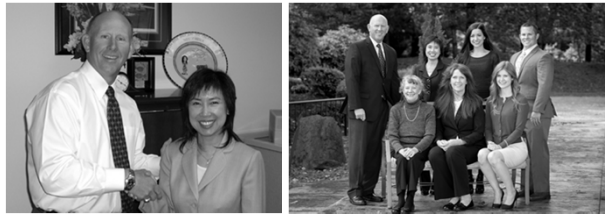
 **Manage your Energy**

 **Manage your Time**

 **Discipline**

Receiver of "Pay it Forward"

Jeff Owens – MDRT TOT, Life Member Alice Tang – MDRT COT, Life Member



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Paying It Forward really Pays Dividends!

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Q&A

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