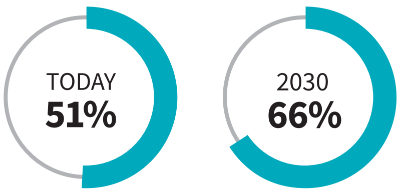
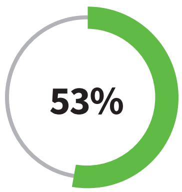
Growing your value to women investors: Strategies for expanding your practice

Prospecting to women may be one of the best opportunities today for expanding your business. Women are major financial decision makers, and they control an increasing portion of wealth and income in the United States.



Women control the majority of personal wealth in the United States, and the percentage is growing.

Source: BMO Wealth Institute, 2015.



53% of women do not have financial advisors.

Source: *Harnessing the Power of the Purse*, Andrea Turner Moffit, 2014.

The *Women and Investing* program includes:

- Growing economic importance
- Building successful communication
- Segmenting strategies for practice growth
- How Putnam can help

Specific planning considerations

Forces that can influence a woman's path to successful financial planning

Women feel a disconnect

71% of women say Wall Street is not in touch with their needs

Different financial priorities

Women are more likely to prioritize daily living costs and paying off debt over saving for retirement

Longevity

Women live, on average, 86.6 years versus men who live 84.3 years.

Strategies for prospecting

Opportunities for advice

Advisors seeking to build their business may want to assess their value proposition and consider the best ways to communicate their capabilities. This presentation covers:

- Sales ideas to engage more women prospects
- Client event to reengage the spouses of your current clients
- Ideas to make your brand more engaging to women

Sources: Joint Economic Committee, 2016; Rice University, 2015; HealthView Services, 2017; Social Security Administration.

Three key goals, one committed partner

WEALTH MANAGEMENT

Taxes
In a changing landscape, get insight on complex tax laws and ideas for effective tax planning.

Intergenerational wealth transfer
Learn new ways to capitalize on the $30 trillion in assets projected to transfer to a new generation.

Asset protection
Find strategies to help clients with this challenge and to broaden the value proposition of your practice.

PRACTICE MANAGEMENT

Women and Investing
Get insights on the distinct investment challenges for women, who control 51% of U.S. personal wealth.

Social media
Use our one-on-one LinkedIn training, social media playbook, and other tools to help build your online brand.

Millennial Money
Learn new approaches for connecting with the next generation of investors.

INVESTMENT MANAGEMENT

Market Perspectives
Get research-driven analysis of evolving market themes from our investment professionals.

FundVisualizer
Use this tool to analyze thousands of funds and indexes, make head-to-head comparisons, and generate client-approved PDFs.

Portfolio Solutions Group
Consider this diagnostic service to help identify unseen risks in client portfolios.

To request a *Women and Investing* presentation, contact your Putnam consultant at 1-800-354-4000.

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