

WHAT AFFLUENT WOMEN WANT FROM THEIR ADVISORS

Over the next forty years, women will inherit approximately 70% of the \$41 trillion in intergenerational wealth transfers, or \$28.7 trillion in assets. These same women report being highly dissatisfied with the financial services industry and the advisors who currently serve them.

Participants walk away with:

The 5 Common Mistakes Advisors Make When Working with Women of Wealth

Proven Strategies for Balancing His Needs With Hers When Advising Couples

The 5 Essential Skills for Building Trust with Affluent Female Clients

A Checklist for How to Be a More Female-Friendly Advisor and Firm

The Do's and Don'ts of Successfully Marketing to Affluent Women

In this keynote presentation, Kathleen Burns Kingsbury, an expert in the psychology of women and wealth, offers practical strategies for connecting with and advising affluent women. Learn how to take simple, actionable steps to improve the advisor-female client relationship, how to incorporate key gender differences into your marketing and advising practice and how to improve client satisfaction now and into the future.

Kathleen Burns Kingsbury

is a wealth psychology expert, behavioral change specialist and author of several books including *How to Give Financial Advice to Women: Attracting and Retaining High-Net-Worth Female Clients* (McGraw-Hill, 2013). She is the founder of KBK Wealth Connection, a company dedicated to training, coaching, and consulting with financial services professionals to improve client communication, retention and profitability.

As an expert on financial psychology,

As an expert on financial psychology, Kathleen has been quoted by *The Wall Street Journal*, MSNBC's *Today Money*, *Forbes's ForbesWoman*, Thomson Reuters's *Reuters Wealth*, and *Financial Planning Magazine*. Her articles have been published in *Advisors Perspectives*, *American Banker Magazine*, *Financial Advisor*, *Investment and Wealth Monitor*, and *REP Magazine*. In addition, she is a regular contributor for *Financial-Planning.com*, *OnWallstreet.com*, and the *Women Advisors Forum*.

Kathleen serves as a faculty member

of the Investment Management Consultants Association's Certified Private Wealth Advisor (CPWA) program and an adjunct lecturer at the McCallum Graduate School of Business at Bentley University, where she teaches Psychology in Financial Planning. She is frequently asked to keynote at industry conferences and has been engaged by financial firms including Pioneer Investments, State Street Global Advisors, and TD Ameritrade Institutional as a consultant and trainer.

Kathleen holds a Master's Degree in Psychology,

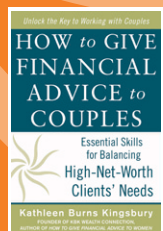
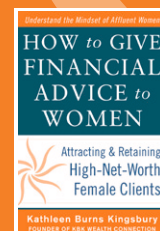
from Lesley University and a Bachelor's Degree in Finance from Providence College. She is a member of the American Association of University Women, the Financial Therapy Association, the National Speakers Association, the Purposeful Planning Institute, and an affiliate member of the Boston Estate Planning Council.

Her next book, *How To Give Financial Advice to Couples: Essential Skills for Balancing High-Net-Worth Clients' Needs*, will be published by McGraw-Hill in September, 2013.



Kathleen Burns Kingsbury

Author and Wealth Psychology Expert



kbkwealthconnection.com

508.297.1212

kbk@kbkwealthconnection.com