

WORLD CLASS TRAITS OF FA TEAMS

Aging With Dignity Workshop



mfs.com

Client acquisition techniques

MFS Heritage Planning® resources address these client concerns:

- Caring for aging parents
- Deciding about in-home services
- Finding the right care facility

Our success in getting in front of qualified prospects depends on understanding the types of events that clients will invite their friends to. Successful advisors understand that our aging clients' greatest concerns are "stage-of-life" questions: What comes next? In-home care? Retirement-home living? A congregate care facility? Host a workshop that both serves your clients and puts you in front of prospects. Call it "Aging With Dignity."

Step one: The speakers

Speaker one: A representative from an in-home care group. This speaker can talk about services that can be provided in the home, the costs for these services and how others have "aged in place," adding services as they've aged.

Speaker two: A placement nurse. This private consultant can discuss the different types of facilities — retirement homes, retirement communities and congregate care facilities — the costs associated with each and some common placement issues and restrictions.

Speaker three: A hospice care director. With a frank yet sensitive approach, this speaker can address the capabilities of hospice care up to an 18-month stay, as well as common family concerns and challenges.

Step two: The audience

Invite not only clients who are in their 70s, but those in their 40s and 50s with aging parents. In your invitation, encourage clients to bring friends who have the same stage-of-life challenges:

"I'm delighted you want to attend this event. I know you have friends who are facing these same stage-of-life decisions right now. Please invite them to attend with you. I can reserve as many seats as you'd like. Why don't you call me by Monday afternoon and let me know who is coming with you."

Step three: The close and the follow-up

"The challenges of aging with dignity are a reality, and we need to plan for them. I've put this workshop together to help you and your families plan for your own situations." Please check with your firm's Compliance Department before initiating events to verify that the activity complies with firm policy and industry rules.

Remember: Be sure to follow your firm's approval process to obtain approval for any sales ideas or marketing materials you would like to use with clients.



For help with this and any other business-building ideas, please call your MFS® partners at 1-800-343-2829 (US).

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