



## Defining Dreams

*Marketing Tips from Derrick Kinney—more from*

By Robert F. Keane

Most advisors spend a lot of their time and energy looking for new clients and would agree that it's a lot better to have the clients looking for you. Sounds like a bit of a pipedream, but Derrick Kinney insists it can be done. "I think the preeminent thing is that it's critical to position yourself as the advisor of choice for the affluent in your local buying area, similar to the most well respected doctors and medical personnel," he says. "If you have the reputation as being the person to go to you no longer have to prospect, because you are attracting those clients."

This advice comes from Kinney's own experience, both as an advisor specializing in retirement and investment planning with Ameriprise Financial, and as someone who speaks to broker/dealer groups around the country on how to succeed with the affluent. Kinney also shares his expertise in his book, *Master the Media to Attract Your Ideal Client*, and at his Web site: [www.moreaffluentclients.com](http://www.moreaffluentclients.com).

Kinney stresses that with this target audience, the advisor's financial acumen is only a starting point. What really makes or breaks the deal is the emotional connection that's established between the advisor and the client. "Helping them define their dreams, I like to call it," says Kinney. Because of the emotional bonds he establishes with clients, Kinney feels he can assist them in determining "what it is they want to do and achieve of significance in the second half of their lives. You'll know you've hit a chord when they suddenly sit back and their eyes look off to the sky a little bit and they really start to picture what it is they want. There's no shortage of people who can help them calculate what they need to save for retirement, but there is a shortage of people who can help them really define their dreams and help them achieve those goals."

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