BENTO ENGINE

GET MORE CLIENTS BY PLAYING OFFENSE & DEFENSE WITH PROACTIVE ADVICE

WEALTH MANAGEMENT CLIENTS
who receive frequent, comprehensive advice are more satisfied and enjoy better financial outcomes. In turn, financial advisors who provide such holistic advice benefit from higher loyalty, higher referral rates, and higher share of wallet.

Unfortunately, there's still an advice gap – there's more work to be done.

68% of Americans pass without a Will (Source: Caring.com, 2021)

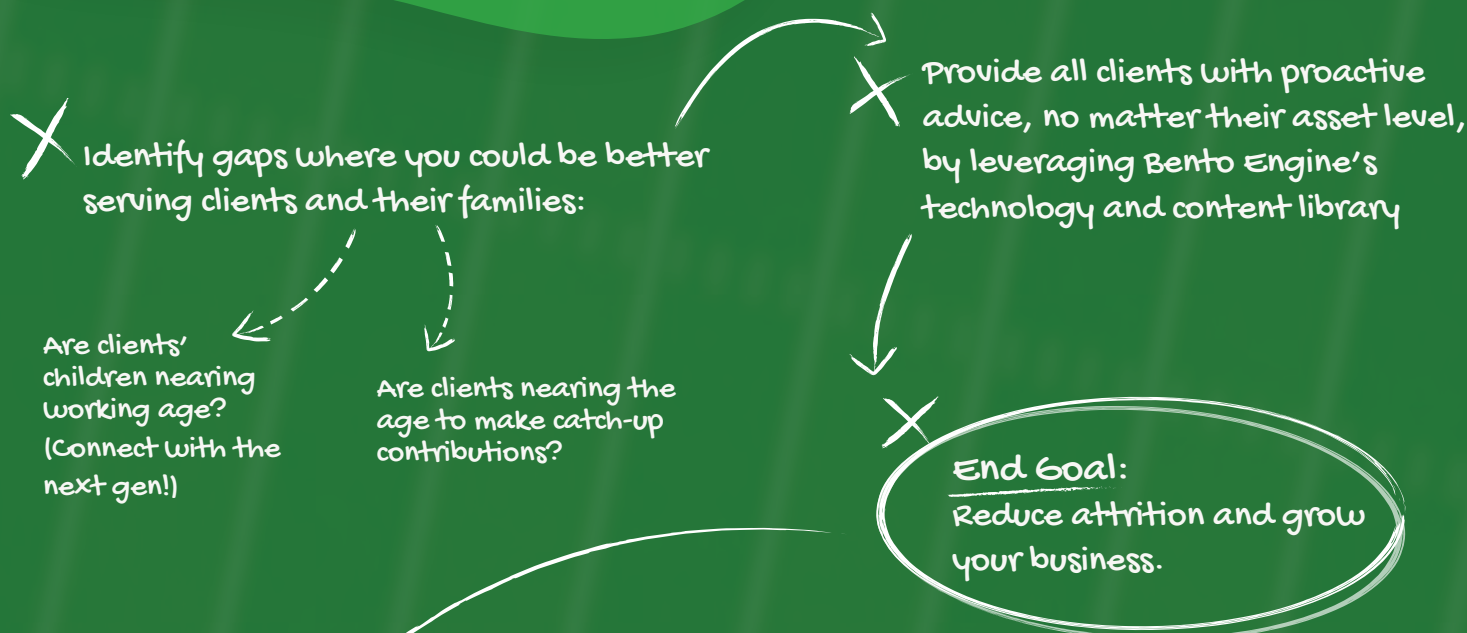**64%** of Americans do not know what a 529 Plan is (Source: Edward Jones, 2021)

15% Only 15% of those eligible to make Catch-up Contributions in their retirement accounts actually do so (Source: Vanguard, 2021)

But with the right gameplan, involving both defensive and offensive strategies, advisors can not only help close the advice gap, but do so in a way that benefits their clients and grows their business.

PLAY DEFENSE
Reflect about your own book of business

Identify gaps where you could be better serving clients and their families:

Are clients' children nearing working age? (Connect with the next gen!)

Are clients nearing the age to make catch-up contributions?

Provide all clients with proactive advice, no matter their asset level, by leveraging Bento Engine's technology and content library

End Goal: Reduce attrition and grow your business.

PLAY OFFENSE
Share proactive guidance with your prospects about important and highly predictable age milestones

Oftentimes, their incumbent advisor does not serve clients proactively

Differentiate yourself by helping them benefit from all tax-advantaged saving and investing opportunities

Use technology like Bento Engine to identify upcoming age-based opportunities

Put Bento's library of content, including slide decks, phone scripts, and email templates, to use to communicate with your clients and prospects

End Goal: Serve more clients. Provide better advice. Improve outcomes. Grow your business.

SEE HOW BENTO ENGINE CAN BE A KEY PLAYER IN YOUR GROWTH STRATEGY TODAY

SCHEDULE A DEMO

BENTO ENGINE