

Ideas for Connecting With Women



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Successful events used by top advisors

Women often have distinct financial priorities, life experiences and decision-making approaches. Below are successful client engagement strategies and event ideas used by top advisors to strengthen relationships and engage women around life, family and financial priorities.

Core Life and Financial Planning Conversations

Navigating Major Life Transitions	Support clients navigating major life transitions through a guided workshop on financial independence and planning during divorce, widowhood or other significant life changes.
Planning for Aging Parents	As parents age, financial and care decisions become increasingly important. Host an event that helps clients plan for care, evaluate costs and navigate conversations with family members. Connect with trusted elder care specialists for additional support.
Career Progression and Wealth Building	A workshop with a career expert or compensation specialist focused on salary negotiation, equity compensation, bonuses and making informed career moves that impact long-term wealth.
Confident Investing for Women	Many women are balancing evolving financial priorities shaped by their careers, families and long-term goals. Host an educational event focused on building clarity and confidence in long-term investing decisions.
Generational Wealth and Legacy Planning	Host a workshop focused on generational wealth and legacy planning, helping clients navigate strategies for transferring assets, sharing values and preparing the next generation.



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Protection, Preparedness and Long-Term Confidence

Digital Security and Fraud Prevention	With the rise of sophisticated scams and digital fraud, protecting personal and financial information is more important than ever. Host an educational event focused on helping clients recognize and avoid common threats.
Planning for Life's Unexpected Moments	Offer a hands-on session with a certified CPR and first aid instructor to build confidence in responding to medical emergencies and unexpected life events.
Longevity, Health and Financial Planning	Explore how longer life expectancies impact retirement and planning lifestyle choices and long-term financial security.

Connection and Community Experiences

Community Impact Events	Host a donation drive that brings clients together around a shared purpose. Invite attendees to contribute items for a local cause while fostering meaningful connections withing your community.
Curated Cultural Experiences	Host relaxed shared experiences such as museum visits, author talks or travel discussions that encourage connection and conversation.
Wellness and Financial Balance	Host a wellness-focused event such as a fitness class that brings clients together in an energizing setting. Use the time to naturally connect the importance of physical well-being with long-term financial health.
Balancing Career, Family and Financial Priorities	Invite a life coach to help clients explore strategies for creating greater alignment between personal priorities, professional demands and financial goals.

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

Please follow your firm's approval process to obtain approval for any sales ideas or marketing materials you would like to use with clients. This includes checking with your firm about industry rules and regulations regarding gifts and entertainment before initiating any events.

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