

Communicating Effectively with Women Investors

Women investors can be a dynamic and profitable market for financial advisors who are savvy enough to learn what women investors want and how best to serve them. Do you know everything you need to know to start realizing the tremendous opportunities in today's rapidly growing - and surprisingly affluent - women's market?

Educate

- Forty-seven percent of investors with assets over \$500,000 are women. From 1996 through 1998, the number of women in that category grew 68%, compared to 36% for men.¹ Between now and 2010, women are expected to acquire 94% of the growth in US private wealth and to end up controlling \$25 trillion.²
- The women's market is not a single, homogeneous entity, but comprises several key segments, among them small-business owners, professional practitioners, women executives, and wealthy widows.
- Women prefer to do business with companies that are "ethically responsible" and they pay attention to companies that "walk the talk."³

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| DO | DON'T |
|---|---|
| ...ask about her social concerns when you're discussing her financial goals and risk tolerance. | ...refer to women's "unique financial needs" - she just wants to be treated as an individual you respect and listen to. |
| ...show her how her current portfolio does - or doesn't - reflect her social concerns. | ...brush aside her question or tell her it's not relevant. Women tend to be more attuned to detail and the deciding factor for her may be something you wouldn't see as important. |
| ...provide an attractive solution that reflects her social and financial goals. | ...misread her signals. When she nods, it means that she's listening to you - not that she necessarily agrees. So don't take it as a cue for closing the sale. And realize that she actually means it when she says |

Contact Calvert

- [Send E-mail](#)
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Featured Client Tool



"How Can You Know What Women Investors Really Want?" B/D-only sales solution.

"maybe" or "I'll think about it" - and that she's expecting you to follow up.

Recommend

Partnering with Calvert can be an excellent way to build strong, enduring relationships with women investors.

- Calvert offers more than 30 funds in every major asset category to help you meet your clients' financial objectives in any market environment.
- Calvert's strong commitment to women means that you can offer your clients something your competition cannot: the opportunity to align their financial decisions with their social concerns.
- Since 1976, Calvert has been a leader in the field of [socially responsible investing](#).
- In 2004, Calvert launched the [Calvert Women's Principles](#), the first global code of corporate conduct focused exclusively on empowering, advancing, and investing in women worldwide.

Support

- [Know What You Own®](#) online portfolio analysis tool
- [Segment brochures](#) on the women's market
- [PowerPoint presentations](#)

¹ Barletta, Martha, *Marketing to Women*.

² "How Financial Institutions Can Help Women Take Better Control of Their Financial Lives," *Prerogative Perspectives*, November 2001

³ Barletta, Martha, *Marketing to Women*.

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