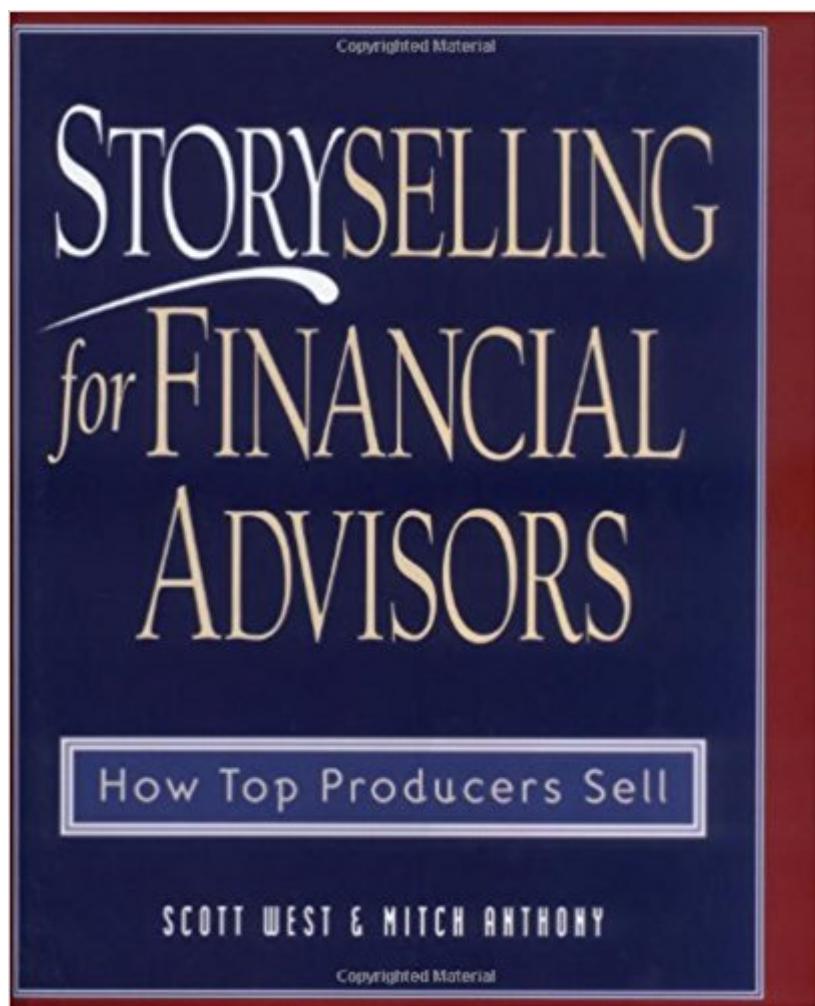


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# Storyselling For Financial Advisors : How Top Producers Sell



## **Synopsis**

Learn what makes a client trust you to be their financial advisor. Put the power of story telling into selling financial products. The authors explain the process of making these intuitive connections, then translate their findings into understandable and practical strategies that any financial professional can use. They present actual stories, including many by Warren Buffet, one of the greatest "storysellers" of all time. These actual stories can help financial pros tap into the "gut reaction" of different types of clients. the book also includes special topics on communicating to women, the 50+ market, and the affluent.

## **Book Information**

Hardcover: 246 pages

Publisher: Kaplan Publishing (January 12, 2000)

Language: English

ISBN-10: 0793136644

ISBN-13: 978-0793136643

Product Dimensions: 7.2 x 0.8 x 9 inches

Shipping Weight: 1.2 pounds (View shipping rates and policies)

Average Customer Review: 4.3 out of 5 stars 76 customer reviews

Best Sellers Rank: #30,370 in Books (See Top 100 in Books) #73 in Books > Business & Money > Marketing & Sales > Advertising #119 in Books > Business & Money > Marketing & Sales > Sales & Selling #287 in Books > Business & Money > Investing

## **Customer Reviews**

Why are some brokers and advisors thriving while others struggle to survive? In *Storyselling for Financial Professionals*, Scott West and Mitch Anthony point out: "In an age of online, do-it-yourself investing, people still yearn for mentoring, for guidance, and for affirmation. Many have gone the Lone Ranger route in investing because they haven't been able to find a broker who knows how to communicate effectively. Make the complex simple and understandable and you will never lack for clients. The storyselling truths and examples in this book will revolutionize the way you sell financial services, and yourself." Be sure and visit [storyselling.com](http://storyselling.com) for more information. Praise for *Storyselling for Financial Professionals* This book is tremendously useful as a practical, well thought out tool to help build stronger relationships with your clients. This book integrates left- and right-brain research in a powerful way. Olivia Mellan, Author of *Money Harmony: Resolving Money Conflicts in Your Life and Relationships* This book is a gem! It should be required reading for

aspiring sales professionals in the financial services industry. What impresses me about this book is that its teachings are based on real world success stories, not on some obscure psychological theory. As an added bonus, it's fun to read. Don G. Powell, retired Chairman, President, and CEO, Van Kampen Investments I founded H.D. Vest on the idea that clients are much more willing to invest with someone who they know has their best interests at heart. Scott West and Mitch Anthony have lucidly explained how the art of the raconteur and the niche-picking strategy of the entrepreneur can combine with this personal approach to make for incredible selling success. I will enthusiastically recommend this book to our representatives. Herb D. Vest, Chairman and CEO, H.D. Vest The best ideas are the simplest. Storyselling for Financial Advisors by Scott West and Mitch Anthony provides an easy to use method to communicate important, but often confusing concepts to your client. James S. Putnam, Managing Director, National Sales, LPL Financial Services

HIGHLY PERSUASIVE individuals, including many top financial professionals, engage clients by using similes, metaphors, anecdotes, and illustrations. They ask open-ended questions, and listen intently to clients' stories, histories, and backgrounds to elicit valuable information and make deep human connections. This communication style allows them to better serve their clients' financial needs -- and sell more effectively in the process. In Storyselling for Financial Advisors, authors Scott West and Mitch Anthony explain how to make these intuitive connections, and they outline understandable and practical strategies that any financial professional can use. The stories of Warren Buffet -- one of the greatest "storysellers" of all time -- and others help financial pros tap into the gut reaction of different types of clients, all the while engaging both sides of the brain -- the logical side and the emotional, intuitive side. Storyselling persuasion techniques offer: -- insights to encourage others to tell their stories-- techniques for making memorable and understandable client presentations-- strategies for tapping into the affluent market-- ways to approach women investors-- surefire tactics that address the unique stories behind the 65+ market-- methods for using stories and analogies to illustrate abstract investment concepts such as compound interest, growth and value, retirement, and more. Storyselling for Financial Advisors is the first book to combine whole-brain persuasion techniques with the sales of financial products. Follow this guide and soon you will be on your way to becoming a financial services professional who: -- sells in an illustrative and straight-forward manner.-- excels in relating and communicating with clients.-- develops specialized audiences for your services.

Great Product! Worth the money!

I've been in the Financial Services business for over 20 years, and since day one, I've been told to present charts, stats, figures, etc. to clients. This type of process is shoved down our throats in this industry. Fortunately, I "got it" long ago and began including right-brain thinking into my presentations. This book, however, has crystallized those beliefs and taken me to the next level. West and Anthony have hit upon a concept that is not necessarily new; however, they have done an excellent job of bringing storyselling to a conscious level for the niche that includes Financial Advisors. I make decisions for myself and my family via careful analysis of facts (or so I think); however, after much thought (pun not intended), I now realize that my emotions play a larger part of that decision-making process. If I "feel" right about something, it's a done deal. Having stated that fact, I wonder: why should my clients be any different? We all think in pictures. Contemplate this: when someone tells you something (or you read something), does your mind see the words they say or that you read? No! You see pictures, photos, etc. This is the way we think, and this is the way sales and communication must be approached. Create pictures that depict what people want to achieve (with honesty and with their best interests at heart, of course; this goes without saying), and success is ensured. This is where storyselling comes in, and this is why this book is so important to those in the Financial Services industry. It cuts to the core of proper communication techniques. This is NOT about manipulation; that would simply be unethical, at the very least. This is purely about finding a better way to communicate your message in a way that will allow others to understand and benefit. A fantastic volume; I highly recommend it!

I thought the book will give me a variety of sell stories how to electrify the prospect, Which there are some stories in the book, However a big portion of the book explains how the brain of a human being is structured, which in real life who cares, why don't spend way more time in the book presenting stories that help?

Fundraisers: Don't judge this book by its title. I'm a big fan of reading outside the bubble of the fundraising industry. Every so often your reward is you run across a shockingly helpful business book that seems at first glance to have nothing to do with fundraising -- and yet is profoundly helpful with that difficult enterprise. This is one of those titles: Storyselling for Financial Advisors. But you say, "I'm not a financial advisor." And I say, "Are you so sure, Ms. and Mr. Fundraiser?" You ask strangers to trust you with their hard-earned money, right? Well, this sage book will explain how to

do that task far more effectively, especially with mid-sized to major donors, using proven techniques developed by top-selling financial advisors. Among the book's key points: put away your charts and graphs and learn to speak intelligently to the right side of the prospect's brain, the place where the emotions reside.

I was expecting some actual stories that I could use...

Good content, but as with most sales books I read, I always think to myself, "Geez, they could have written this book with half as many words and charged me a lot less for the book." This one is no different. Love the content, but it could have been a shorter less expensive read in my opinion and been just as effective.

Missing so many of the actual examples of stories. Very long winded and repetitious on why one should use stories.

This is an excellent book that goes to the heart of interpersonal communication in regards to the marketing of financial services but the principals laid out really do apply to any walk of life. Of course, the art of persuasion can be either for good or for greed in this case. I would hope that whoever sits down with individuals and families has it within them to do the right thing and provide financial services for their customer's needs and not just to create personal revenue from a transaction. I was part of a financial seminar given for financial advisers in which Mr. West was a speaker. He indeed embodies the content of this book and I'm sure would have been wildly successful in any avenue of sales or whatever he pursued.

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