

how long should a wealth management meeting be? ?

description

how long should you spend in a [client meeting](#) in the dynamic world of wealth management? is it about [quantity or quality](#), and does following the high-frequency meeting approach of big banks pay off?

quality over quantity: the new meeting mantra

tailored duration: there's no one-size-fits-all. a meeting should last as long as it needs to address the client's unique needs and questions comprehensively.

efficiency is key: focus on being concise yet thorough. efficient meetings that respect the client's time can be more effective than longer, less focused interactions.

rethinking the sales approach:

not a sales pitch: unlike an investment fund salesperson, a wealth manager's role is to understand, advise, and [build a relationship](#), not just close a deal.

building trust: frequent, shorter meetings might seem impressive, but building trust and understanding takes time and genuine engagement.

what's the goal?

understand client needs: the aim should be to deeply understand the client's financial goals and concerns, not to meet a quota.

provide value: each meeting should leave the client feeling informed, understood, and confident in [their financial strategy](#).

your strategy

how do you approach wealth management meetings? do you prioritise the length or the quality of interaction? what have you found [most effective in fostering strong client relationships](#)?

source: [linkedin](#)

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