

## Circuit training – station 1 - Networking

### **If you Schmooze you won't lose**

Lorraine Reddaway  
RBC Brewin Dolphin

This is for authorised /regulated individuals only and should not be distributed in whole or part to retail clients.

# Networking opportunities



**1. What is  
Networking?**




**2. Why should we  
bother? – Key  
reasons**



**3. Our approach**



**4. Helpful Tips**

A pair of hands is shown from a top-down perspective, gently cradling a nest made of dry straw. Inside the nest, three light blue eggs are visible. The background is a dark, solid color, making the hands and nest stand out.

“Networking allows you to build strategic relationships where you can ‘nest’ and become a valuable resource within target markets”

- Susan Cooper, Managing Director, Prudential

slow and  
steady...





***Ruby Wax***

The importance of empathy with connections and building trust.

## 2. Why bother...

If you have more business than you and your business can handle...

We are all way too busy

Good busy?

Bad busy?



# 6 core reasons for bothering to network



1. Grow your business



2. Land a new job



3. Learning



4. Solving a specific problem –personal or business related



5. Social Reasons



6. Gratuitous

What are we looking for?

New  
businesses  
& clients?



# “Your Network is your Net worth”

## Jim Rohn



**Paul Stanfield** · 1st

Supporting the financial advice sector \* Enabling firms to navigate regulations \* Aiding professional development

London, England, United Kingdom · [Contact info](#)

[500+ connections](#)



FEIFA



Loughborough University



*Sales Mindset?*





OPEN & FRIENDLY



APPROACHABLE



INTERESTING AND  
INTERESTED



CURIOUS

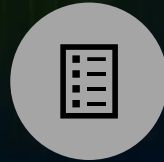


HONEST

Networking  
Mindset?



UPBEAT



HELPFUL



EYE CONTACT



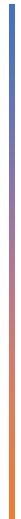
## Helpful tips





# Elevator pitch 1

“We provide wealth management services to EU based IFA’s whose clients are mainly British Expats. The investment services we provide lead to improved client outcomes and enrich the services offered through our adviser partners. By outsourcing the investment decisions to our adviser clients, they in turn are better placed to concentrate on big picture financial planning with their clients”





# Elevator pitch 2

- “We work with advisers who help their clients make the very most of their money that they’ve worked long and hard for.... We are money managers and our number one rule is not to lose clients cash so they can sleep at night and live life to the full”









A man in a dark blue suit and tie is holding a white rectangular sign with his right hand. The sign has the text "This is not confetti" written on it in a black, handwritten-style font. The background is a blurred outdoor setting with green foliage and a yellow flower.

This is not confetti



**EXIT**



# RBC Brewin Dolphin - EU intermediary range of Discretionary Management Services

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## Your Business Development team



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**Joy Callender**

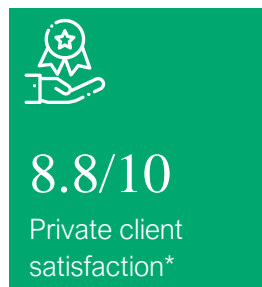
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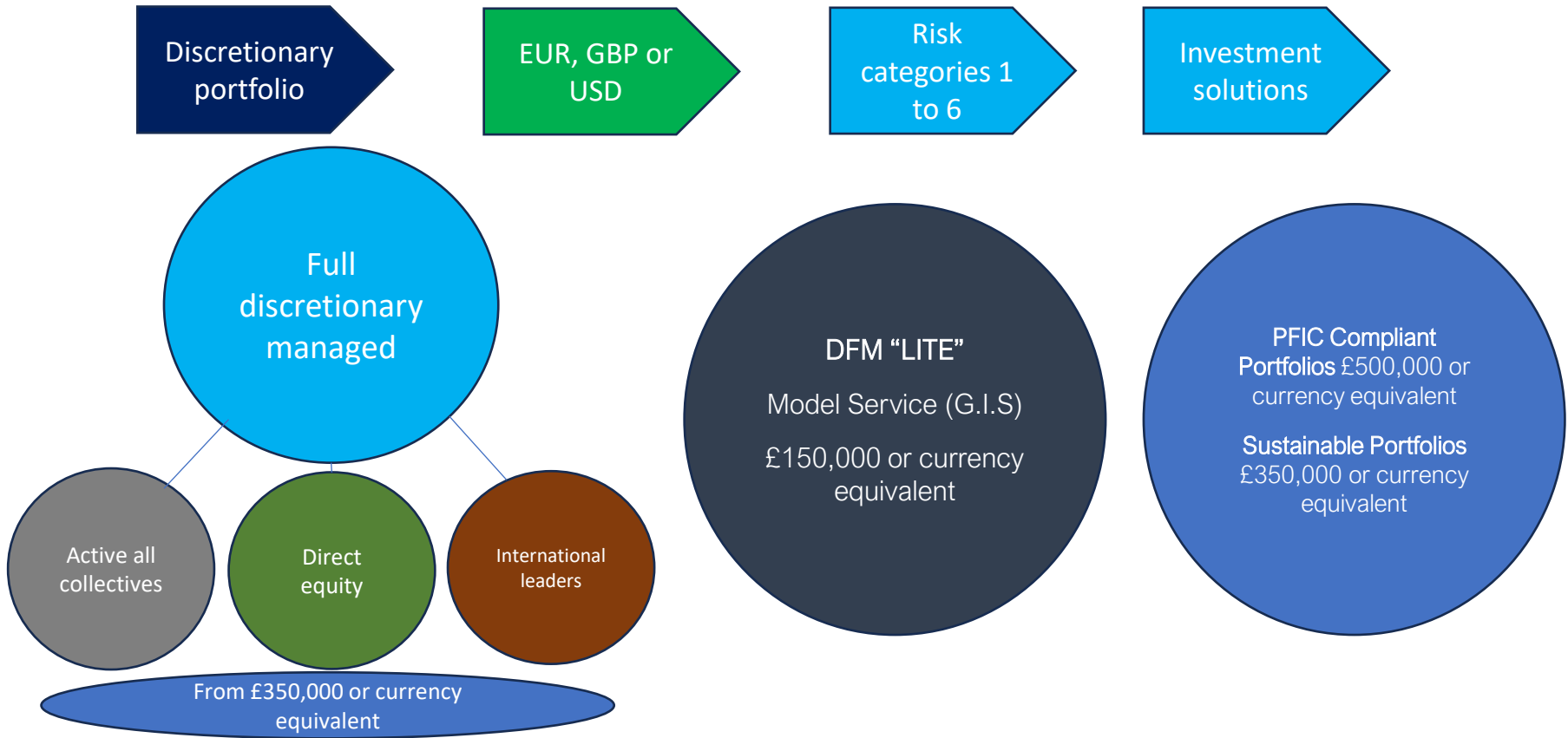
# RBC Brewin Dolphin - EU intermediary range of Discretionary Management Services



- Founded in **1762**, we have grown to become one of Ireland and UK's leading wealth managers by continually meeting the high expectations of our clients and helping them achieve financial security and wellbeing.
- Our clients are often ambitious people. They have high aspirations for themselves, for their families and for their futures.
- We provide highly personalised financial advice and investments supporting a broad range of clients with four crucial aims: growing their money, preparing for retirement, preserving their lifestyle and passing on their wealth.
- Over the years we have guided clients through all market cycles. It has taught us the importance of maintaining a long-term perspective and seeing beyond short-term fluctuations.

<sup>1</sup> H1 results, for the three months ending 31 March 2022.  
\*Source: Report by Aon on behalf of RBC Brewin Dolphin, comprising c.1,854 client responses, August 2021.

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