

PRESS RELEASE

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New Book from Oechsli Institute Helps Financial Advisors Master
Prospecting And Selling Skills Unique To Targeting High Net Worth
Investors

GREENSBORO, NC - Nov. 17, 2003 /Send2Press Newswire/ -- The Oechsli
Institute (www.oechsli.com) announced today the publication of a new
book by Matt Oechsli, "Mastering High Net Worth Selling: Your Critical
Path" (ISBN 0-9656765-5-2) which focuses on the four tasks that today's
financial professional must learn to do well.

Tasks include:

1. Find high net worth prospect who are "in transition"
2. Orchestrate successful face-to-face meetings with those prospects
3. Seamlessly execute selling skills that lead to clinching a long-term advisory relationship
4. Manage client loyalty at a level that generates ongoing introductions and referrals.

With few exceptions, the entire retail side of the financial services industry is targeting the high net worth market segment. However, an Oechsli Institute 2003 independent study of over 400 Wealth Management Teams indicates that only 28% are performing well in the high net worth client acquisition area. Mastering high net worth selling is the critical path to future success.

"This is one of the few books I have seen which presents a step-by-step approach to going up-market and also combines the emotional, psychological, and actionable steps needed to take one's practice to the next level," states Uwe F. Schweikert, Vice President of American Express.

Key aspects of high net worth selling are introduced by research-based self assessments. The selling skills covered in this book include:

- * Overcoming high net worth sales reluctance.
- * Finding high net worth prospects who are "in transition."
- * Getting face-to-face with the right prospects.
- * Communicating effectively with four different decision-making types.
- * Articulating a value proposition with clarity and conviction.
- * Mastering the art of the mini-close.
- * Overcoming the four objections wealthy prospects use most often.
- * Mastering the big three: trust, value, and respect.
- * Clinching a long-term high net worth client relationship.
- * Becoming a "go-to" high net worth financial quarterback.
- * Using introductions and referrals to keep the pipeline full.

"Mastering High Net Worth Selling" is in soft cover and retails for US \$29.95.

The first public "Mastering The Art of High Net Worth Selling" seminar for Financial Advisors is being offered in Greensboro, NC on

January 9, 2004.

For more information, or to place an order, visit <http://www.oechsli.com>
or call 800-883-6582.

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