

4 Key Components of Building Client Trust



Holistic wealth management and trust are two sides of the same coin. You can't have one without the other—both put the client at the center of financial planning. You need to know who they are, what they want, and how finances play a larger role in their everyday life. Coupled with your expertise, they are both crucial components of leading to a client's financial confidence.

Our independent research found four key components to building trust: credibility, competence, customer service, and education. Below, you'll find how to incorporate these elements into a holistic wealth management experience and how CapIntel proposals can help expand them even further.

1. CREDIBILITY



Problem: Finance is a complex subject. Clients need to know you're someone to trust—and you need a way to show you know what you're talking about.

Solution: Help your clients understand the recommendations you're making. Use visuals to make a complex subject easy to understand.

How CapIntel Helps: Real-time analytics and graphs help your client visualize the process and support your reasoning when presenting the proposal.

2. COMPETENCE



Problem: There are countless firms and advisors that an investor can choose to work with. You need to stand out and showcase what sets you above the rest.

Solution: Highlight your credentials or distinctions with pride and share stories of your experience. It helps investors know you are a trusted advisor.

How CapIntel Helps: Add marketing pages to your proposals to highlight your firm's history and mission, and your experience as an advisor.

3. CUSTOMER SERVICE



Problem: Technological innovation has led to personalized services in many aspects of life. Clients expect this level of care in wealth management, but legacy solutions produce generic proposals.

Solution: Work with your clients one-on-one to understand their holistic financial needs and deliver a tailored service that exceeds their expectations.

How CapIntel Helps: Personalized proposals include as much or as little information as your client needs, including educational content to help make your client more comfortable. Plus, our sleek online tool helps you provide live walkthroughs of comparisons.

4. EDUCATION



Problem: You help clients understand your recommendations, but you only have so much time in a meeting. You need to ensure they feel educated and confident even when you're not around.

Solution: Maintain a relationship with your clients outside of meetings. You can share information, educational articles, and financial news for them to get familiar with when you're not around.

How CapIntel Helps: Add informational graphs, charts, educational content, and concept breakdowns throughout your proposals. When they read it, it will be like you're right there with them.

DID YOU KNOW: Only 32% of Americans feel confident in their investment knowledge.* Your role as an advisor cannot just be to manage a client's money but to curate an experience that improves their overall financial confidence.

Holistic wealth management and trust are key elements to building a client's overall financial confidence. CapIntel makes it easy to provide this level of service with comprehensive proposals that put clients first.

Build better proposals and build client confidence with CapIntel. [Talk to our team today.](#)

*Pollfish Survey, May 2022, N-1,00, <https://www.blackrock.com/us/individual/education>

About CapIntel

CapIntel is a B2B fintech company, serving financial institutions across North America. Its intuitive, web-based applications are improving the overall experience for wealth professionals and investors alike. The company's mission is to elevate personal finance and a significant part of this means growing wealth through investments while creating meaningful conversations between advisors and their clients.

Its platform helps financial professionals deliver transparent, data-driven, and personalized information to their clients so they can get a better understanding of their investments and feel at ease knowing their future is secured. With over 12,000 advisors and 800 wholesalers across North America on their platform, CapIntel is transforming the advisor-client experience. See www.capintel.com for more information.