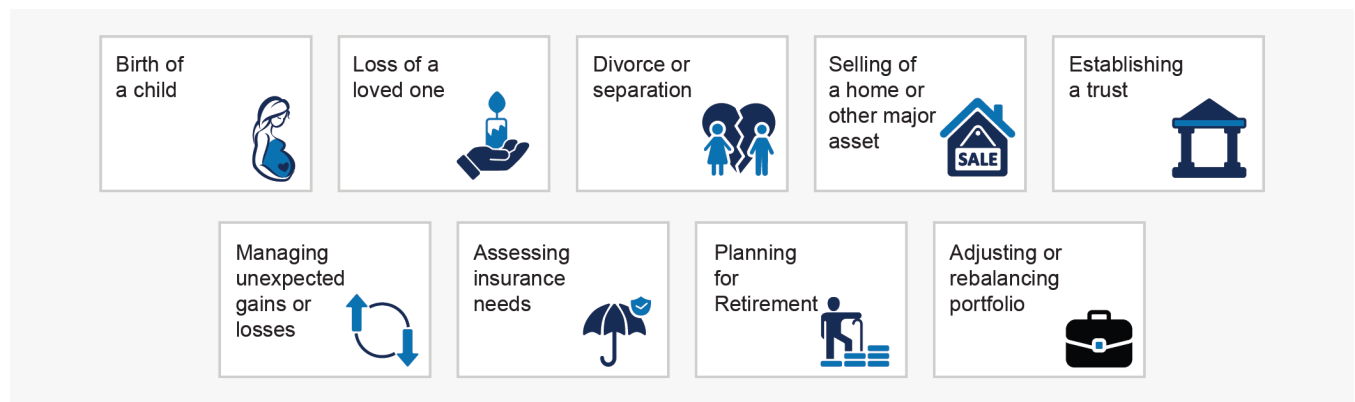




When the Time is Right, Your Wealth Management Partner is Ready

At certain key moments in a client's life, the guidance of a trusted financial advisor can make a meaningful difference. Oppenheimer's wealth management professionals specialize in helping clients navigate life's transitions, offering tailored strategies to address their unique financial needs.

While some of these opportunities may be readily apparent, others might not be immediately obvious. Below are examples of pivotal events when clients can benefit from Oppenheimer's expertise:



How You Can Facilitate a Wealth Management Conversation:

When the timing feels appropriate, consider these steps to introduce your client to Oppenheimer's services:

Start the Conversation: Discuss the potential benefits of connecting with an Oppenheimer financial advisor.

Offer a Financial Plan: Suggest the opportunity for your client to receive a complimentary financial plan, tailored to their goals.

Collaborate with Oppenheimer: Consult with your Oppenheimer advisor to explore how they can best support your client during these important moments.

Make an Introduction: Arrange a meeting or lunch between your client and your Oppenheimer advisor to establish the relationship in a comfortable setting.

Stay Engaged: Follow up with your client during key life events to provide ongoing support and ensure their financial needs are met.

By identifying and addressing these critical moments, you can strengthen your relationships with clients and demonstrate the value of Oppenheimer's wealth management services in their lives.

Disclosure

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