



HAZIC INVESTMENTS

## Crisis Marketing: Tactical Action Point

As we all deal with unprecedented issues related to the coronavirus, the impact of uncertainty on the financial markets and the resultant volatility on investment portfolios can present compelling profitable opportunities to investment professionals like you. However, for many investors it exacerbates anxiety and paralysis. Conversely, for a smaller segment, it may represent time for action. In either instance, investment and retirement portfolios are now receiving more acute attention.

In this crucial time, it's your professional responsibility to concisely and clearly offer information, insights and intelligence to your investors and key prospects that may enable prudent decisions about their investments and wealth as well as possibly alleviate anxieties. This is where you earn the right to be stewards of capital. This is definitely not a time for inability to make decisions. It's a time for bold and decisive action. The information, insights and intelligence you provide in challenging times as an experienced professional will significantly contribute to demonstrating your value, attaining "trusted" status and achieving the "actionable conviction" mandatory for the acquisition, retention and expansion of AUM.

Over the next few weeks, as the situation unfolds and developments take place, strategically and selectively reach out to provide your unique perspectives, some clarity and hopefully a measure of comfort. Additionally, try to gain better insight about your investors and prospects by gathering intelligence about their current and future plans to possibly modify their asset allocation or roster of managers. Make no mistake money will be in motion and you want to be prepared and equipped to be the primary recipient!

Finally, of critical importance, always clearly provide a "call-to-action" (CTA) by way of an invitation to address any questions or concerns they may have about the markets and specific issues via a brief call, email, webex or text as preferred.

Remember: We are all in this together and will come through it together!

Continued success, Stay Calm and EXECUTE!

**As always, I hope you find this helpful.**

**Bryan Johnson**

**Managing Partner**

**Johnson & Company**

**Direct: (512) 786-1569 or [bkj@johnsn.com](mailto:bkj@johnsn.com)**