FOR ADVISORS

For Advisors: Reading a Client's Exposure

You already assess your clients' financial exposure in detail. Their personal exposure is usually assessed by nobody.

WHY THIS LANDS ON YOU

Advisors see the pattern before anyone else does, because the inputs are financial and logistical. Travel bookings, property purchases, liquidity events, a public appointment, a divorce, a company sale. Each one changes a client's personal risk profile, and none of them arrives labelled as a security question.

THE FOUR SIGNALS WORTH NOTICING

None of these requires a security background to spot. They are visible in conversations you are already having.

> A liquidity event or a company sale that becomes public. Named wealth changes who is interested in the client.

> A new public role: a board seat, an appointment, a media profile. Visibility is exposure, and it arrives faster than the client adjusts to it.

> A change in travel pattern, particularly international travel to jurisdictions where the client has no local knowledge.

> A family change: a new home, children reaching an age where they move independently, a household staff change.

WHAT THE CLIENT USUALLY SAYS

Three answers come back, and each one is worth hearing accurately. "I have security" usually means a monitored alarm and sometimes a driver, neither of which addresses the client's own decisions. "I train already" usually means one martial art, often years ago, which covers a single dimension of five. "Nothing has ever happened" is the most common and the least informative: it describes the past.

THE CLIENT WHO ALREADY TRAINS IS THE BETTER FIT, NOT THE WORSE

This is the one worth reading twice, because it silently removes names. An executive who trains has the physical half handled and retains the entire other half: reading environments, practiced exits, and their own risk picture. They are easier to work with and they get further, faster. Do not filter them out.

WHAT A REFERRAL ACTUALLY COSTS YOUR CLIENT

A Discovery Call is thirty minutes and there is no obligation attached to it. Nothing about any engagement is published, no client names are used, and the work is private one-on-one rather than group. If the fit is not there, the call says so.

If a client comes to mind while reading this, a Discovery Call is the whole next step.

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CONCIERGE EXECUTIVE READINESS COACHING

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