

A Guide to Networking in the Later Life Industry

Building trusted relationships to
support better retirement outcomes



The importance of networking in later life advice

Later life advice rarely happens in isolation. Clients often face interconnected financial, legal, property and care decisions, meaning advisers depend on a wider community of specialists. Networking in this space is about building trusted professional relationships that support clients through significant life choices.

This guide explores how advisers can build meaningful relationships across the later life sector, with a focus on long-term value rather than short-term outcomes.

Why networking for advisers matters

For later life advisers in particular, networking can:

- Increase understanding of the wider later life landscape
- Build trust with professionals that clients already rely on
- Support better, more joined-up advice
- Create referral opportunities over time
- Strengthen professional reputation
- Build long-term business sustainability



Where to find the right networking opportunities

Not all networking environments offer the same value. Later life advisers tend to benefit most from sector specific events such as later life conferences, retirement focused seminars, regional CPD sessions and professional forums. Local events hosted by solicitors, accountants or care organisations can also be particularly useful when they attract professionals working with similar clients.

Digital events and webinars can complement in person networking by helping advisers stay visible and connected.

You may also consider hosting your own informal meet ups, such as a coffee morning for local professionals.

Preparing to network with confidence

Preparation can make networking feel more natural. Before attending an event, think about the types of professionals you'd like to meet and what you hope to learn. Having a clear, simple way to describe who you help can reduce nerves and make conversations flow more easily.

Feeling nervous is completely normal. Preparing a few conversation starters, practising a short introduction and setting small, achievable goals, such as aiming for three meaningful conversations, can help build confidence. Focusing on learning about others rather than performing or selling makes interactions feel more genuine.

- **Normalise nerves:**

Acknowledge that feeling nervous is common, even for experienced professionals.

- **Preparation tips:**

Suggest preparing a few conversation starters, practising a short introduction, and setting small, achievable goals (e.g., “Aim to have three meaningful conversations”).

- **Mindset shifts:**

Encourage focusing on learning about others rather than “performing” or selling.

Introducing yourself and approaching conversations

Effective introductions don’t require a rehearsed pitch. In later life advice, clarity and approachability matter more than technical detail. Focusing on the people you support, rather than the products you advise on, tends to resonate more.

Simple openers

“What brings you to this event?”

“How did you get into your field?”

“Have you attended this event before?”

Listening is central to meaningful networking. Asking open questions about others’ roles, experiences and client challenges helps build rapport and encourages genuine connection.

Networking with introducers

Introducers play an important role in later life advice, but relationships should develop organically. Early conversations should focus on understanding how each professional works, the clients they support and their approach to communication and care.

Over time, regular communication and shared experiences create strong partnerships that benefit clients and professionals alike.

We’ve put together an email nurture campaign for advisers to use when contacting introducers to help support each other.



[Request nurture campaign for introducers](#)

Following up and maintaining relationships

Networking carries on long after an event finishes, and a well-timed follow-up can turn early conversations into long-term relationships. Some effective follow up habits include:

- Personalised messages
- Sharing relevant insights and referencing your conversation
- Small, regular interactions to build trust over time



Using digital networking effectively

Digital networking supports in person relationships by helping maintain visibility. Connecting online after meeting someone, engaging with relevant content and contributing thoughtfully to discussions can reinforce your professional profile.

For later life advisers, the same principles apply online as offline: be professional, helpful and client focused.

Measuring networking success

Indicators of progress:

• Growing professional confidence

• Better collaboration experiences

• Stronger reputation over time

• Sustainable business growth

Networking is a skill that develops through experience. Approached with preparation and professionalism, it becomes a valuable part of an adviser's role. For later life advisers, building trusted professional relationships supports better client outcomes and strengthens the wider advice community.

📞 0113 366 0599

✉️ info@pureretirement.co.uk

🌐 pureretirement.co.uk

Company registered in England and Wales No. 7240896.

Pure Retirement Limited, 2200 Century Way,
Thorpe Park, Leeds, LS15 8ZB.

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