



English Channel Swim Hooks Clients

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A DOW JONES NEWSWIRES COLUMN

--An adviser's grueling 13-hour swim attracts potential clients

--Doesn't mention financial planning in his presentations but leaves business card

--Finds the low-key approach an effective one

After three Ironman triathlons and a swim around the island of Manhattan, Sandford Wollman decided to swim across the English Channel.

For a year, he trained for hours and took cold showers to acclimate his body to the Channel's chilly waters. Charged with gaining weight to keep warm, he also ate a pint of ice cream a day.

Then, on July 20, 1995, he dumped a bottle of champagne into the channel, an offering to Neptune and Poseidon, and jumped in. Ten hours later he was in agony, his stroke slowing and his mouth swollen from the salt water.

That was when the ship captain told him that he needed to swim even faster to beat the tides. If he didn't, he would be in the water at least an extra five hours.

The captain yelled at Wollman to pick up his pace, hitting the side of the boat with a stick to punctuate his point. He then helped himself to a roasted chicken Wollman had brought for his crew, eating it piece by piece and then throwing the bones at the weary swimmer.

"He was trying to get me angry," Wollman said. "It worked."

Wollman pushed ahead, touching the shore of France just three hours later. He swam 44 miles (the channel is 21 miles across at its shortest point, but the tides force channel swimmers to take an S-shaped route).



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"I stood on the shore, raised my arms to show I had made it and then cried like a baby," Wollman said.

In 2010, Wollman started Channel Financial Planning in Rye, N.Y., at age 51, after two decades as a partner and merchandising manager for a textile company. He wanted to use his personal and business experiences to help others avoid some of the financial mistakes he had made.

Although Wollman doesn't take assets under management, he recently partnered with a CFA who does. Wollman provides fee-only financial planning services and small business and investment advice.

Earlier this year, while brainstorming ways to get his name out, Wollman had an idea: He'd tell the story of his 13-hour swim. His presentation combines video clips of the swim and personal anecdotes. He focuses on reaching people who are training for an athletic event or who are just interested in an inspiring tale. His audiences have included gym staff and, via teleconference, homebound seniors.

He doesn't even mention his business--he feels that if an audience gets even a hint that you're trying to sell them something, they won't want to listen. "If I can encourage them to reach higher with their personal goals, then the presentation is worth it," Wollman said. "My financial planning is the secondary conversation."

But he also can't ignore the dozens of potential clients he's meeting every time he talks about his swim. So Wollman is subtle, leaving gift bags when he appears in person that include his business card. The understated approach seems to be working: A handful of presentations about the swim in the last few months have netted him two new clients, a few meetings with prospective clients, and several requests to do more presentations.