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# Coach's Corner

Our latest commentary to help you elevate the success of your practice

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[Use Isms to Improve First Encounters](#)

By: [David Richman](#) | June 21, 2022

Inflation. Global tensions. Volatile markets. How can you weigh in when topics like these come up in conversation with someone you've just met? Thought-provoking isms can help you respond with the wisdom and perspective of a professional.

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By: *Eaton Vance* | June 14, 2022

This tax year—like every tax year before it—will end on December 31. This truism means that the opportunity to help your clients improve tax outcomes is time-sensitive. The clock is always ticking, and the end of June marks the halfway point.

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[Attracting Clients](#)  
[Make First Encounters Count This Summer](#)

By: *David Richman* | June 9, 2022

The start of the summer is ideal to make first encounters count—family gatherings, weddings, neighborhood events, or even on vacation. Normally, we do not advocate talking business in social gatherings. However, these are not normal times.

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[Turning Tax Losses Into Client Wins](#)

By: *Eaton Vance* | June 1, 2022

Have you ever noticed what happens in a conversation when you use the word "loss"? The typical reaction is that the other person stops listening as soon as the word leaves your lips. It's as if that other person is struggling to find a way to explain to you that they don't want to lose money. Nobody does, of course, but it happens. How can you turn these loss conversations into client wins?

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[Turn the Proverbial Light on With the Right Phrases](#)

By: David Richman | May 25, 2022

The key to inspiring action — the third dynamic of Chasing Positivity® — is understanding two key moments:

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[Are Investors Too Bullish on Bearishness?](#)

By: David Richman | May 23, 2022

Understandably, client conversations are challenging these days. Seemingly even more problematic are prospecting calls mired down with this objection: "Just not comfortable investing in the market right now."

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[Build Better Tax Outcomes](#)

By: Eaton Vance | May 18, 2022

How long do clients have to prevent a recurrence of an unpleasant income tax filing? The short answer is "the rest of the year." Therefore, if a taxpayer discovers underwithholding in May, there are only seven months to correct it before year-end.

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[Attracting Clients | Chasing Positivity](#)  
[Transform Conversations With a Simple Word](#)

By: David Richman | May 11, 2022

Including certain words and phrases in your conversations can help you inspire prospects and clients to take actions that are in their best interests. The most powerful way for you to transform prospect and client conversations is using the word "and," as it has such versatility.

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[On Taxes: When No Surprise Is the Best Surprise](#)

By: *Eaton Vance* | *May 3, 2022*

Starting a conversation with current and prospective clients after "tax season" can be as simple as asking: "Did your tax bill (or refund) catch you by surprise this year?"

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[Reframe the Purpose of Prospecting Calls](#)

By: *David Richman* | *April 27, 2022*

Have you ever been on a prospecting call where the the prospect is still speaking and you are already framing your next comment? We have all been there.

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[3 Questions to Foster Collaboration](#)

By: *David Richman* | *April 19, 2022*

For the past two years, existing and prospective clients experienced their own unique journeys with their health, families, businesses and, potentially, even shifting mindsets and priorities. This is no time for superficiality. Rather it is the perfect opportunity to ask better questions, deepen client connectivity and collaborate consciously.

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[After-Tax Advisor | Working with the Wealthy](#)  
[When Talking Taxes, See the Big Picture](#)

By: *Eaton Vance* | *April 12, 2022*

Heading into the thick of "tax season" is a good time to evaluate how well you understand your existing clients' total tax pictures. A look at their tax forms can reveal information that can lead to timely conversations about ways to optimize their tax situations. Based on what you find, consider asking questions like these:

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[Turn Prospects Into Clients During Tax Season](#)

By: *Eaton Vance* | *April 6, 2022*

Tax Day is right around the corner. Are your prospective clients aware of how different tax scenarios might affect them? As an After-Tax Advisor, you can encourage them to look beyond this year's tax outcome by asking questions that will arouse their curiosity, stimulate their thinking and attract their business.

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[Beware the 'Premature Pivot'](#)

By: *David Richman* | *March 30, 2022*

Life events, such as the sale of a business, can open doors to meaningful conversations if you leave yourself behind — this means doing your best to attempt to see the world through your clients' eyes instead of your own. Asking thoughtful discovery questions can help you better understand purpose and ultimately tailor the advice and guidance you may offer.

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