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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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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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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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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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[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 | **Attracting Clients**
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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Managing Director
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